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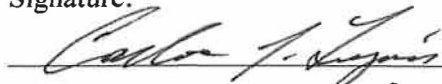
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## **PM 686B Final Course Deliverables Submission**

The following guidance is intended to clarify the requirements contained in the PM686B Capstone Project syllabus.

For your final PM 686B Course Deliverables, you will be provided with two binders by the PM Department that each include colored pages to separate the key sections of the final report as outlined below. One completed binder will be submitted to the department; one will be retained by you. The binder that you submit with your final PM 686B deliverables is due on the date specified in the syllabus, should include the following, and should be organized in separate sections as follows:

### **Tab #1: Final Project Report**

1. Final written project report (20-35 pages). Formatted to PMI standard.
  - a. Abstract and Keywords
  - b. Literature review results
  - c. Research Method/Approach (detailed description)
  - d. Analysis
  - e. Results
  - f. Conclusions
  - g. Recommendations for further research
  - h. Other sections as needed
2. Appendices. Separate from final written project report. These should not be included in 20-35 page count.
  - a. Product(s) of project (e.g., templates, tools, business plan, etc.) for product-oriented project
  - b. Research data (e.g., survey used, raw data, detailed analysis, graphics, etc.) for research-oriented project
  - c. Other detailed exhibits as appropriate

### **Tab #2: Final Project PowerPoint Presentation (print out)**

### **Tab #3: Project Lessons Learned Narrative (2-3 page narrative of your lessons learned from conducting this project)**

### **Tab #4: Selected Knowledge Areas (3-4 page narrative of which selected KA's you chose, why you chose them and how they were used to demonstrate your mastery of the knowledge areas and to enhance your project results).**

### **Tab #5: Updated Project Management Plan (current, updated version of your project management plan that includes all necessary subsidiary plans, approved changes, and necessary items (e.g., WBS, updated Gantt, Requirements Traceability matrix, Risk Register, Stakeholder Register, etc.)**

### **Tab #6: Project Charter (with necessary updates)**

### **Tab #7: Letters from Project Sponsors**

### **Tab #8: Digital media files containing a complete set of the contents of the binder. A labeled, blank CD will be provided by the department.**

**In addition to submitting the CD with your binder, you must post all of same files organized in this same structure in a single Zip file to the designated "Final Deliverables" folder in Blackboard.**

**Any member of the PM Department Administrative Support staff is prepared to assist you in understanding and complying with these deliverables submission requirements, and to make the process as efficient as possible for you.**



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**

**Carlos Lujan, MSPM Student, BP Exploration (Alaska) Inc.**

**Final Project Report**

### Revision History

Revision No.	Author	Approved	Date
0	Carlos Lujan	Mike Spitz	11/18/14
		Ray Schulte	11/18/14
		Walter Almon	11/18/14
		Randal Buckendorf	11/19/14

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## **1. Abstract and Key Words**

### **1.1. Abstract**

The production of oil and gas in the major North Slope fields in Alaska is on the decline as it is in any major oilfield of this age. Capital resources must therefore be utilized with the greatest efficiency.

BP Exploration (Alaska) Inc. (BPXA) Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category (Cat) "C" projects (range from \$250,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process.

One of BPXA's strategic objectives is to improve the utilization of Cat C projects capital resources. The project will develop and clarify business objectives ensuring only Cat C projects with strong business drivers will be funded, unless the project is an integrity or health and safety project. This approach will ensure that fit-for-service improvements are selected for execution.

### **1.2. Key Words**

Stage-Gated Project Development Process, Budget Boundaries, Business Categories, Defining Business Objectives, Business Objectives Criteria, Business Objectives Prioritization Process, Business Objectives Prioritization Matrix, Facility Optimization, Facility Future Plan, Reliability and Operability, Business Case Analysis, Setting Business Priorities

## **2. Introduction**

### **2.1. Project Objectives**

The project provides a step-by-step BPXA Category (Cat) C project assessment tool to define business objectives, quantifies the business drivers, and provides a tool to use for the subsequent prioritization. The project was developed using an analysis of existing Cat A and B business objectives and prioritization literature provided background information on current strategies. In addition, analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were identified to be examined. This project includes research, development of business objectives criteria definition, design of analytical hierarchical process matrix, and documentation to logically apply a step-by-step tool to identify and quantify business objectives to assist with BPXA Cat C project prioritization.

### **2.2. Background**

The Project Manager (MSPM Student) must complete the University of Alaska Anchorage (UAA) Master of Science in Project Management (MSPM) capstone project in order to be eligible to receive the master's diploma. The Project Manager is responsible for completion of the capstone course which is designed in two parts:

- PM 686A Project Initiating and Planning (Individual study: Initiating and planning, preliminary research/needs identification of analysis, development of project preliminary outcomes, preparation of approved project management plan, and presentation of plan)
- PM 686B Executing, Controlling and Closing (Individual Study: Research analysis, execution, controlling, closing, documentation, and presentation of results of the project)

The Project Manager must also apply 3-4 project management knowledge areas during the PM686A and PM686B execution. The Project Manager selected Project Communications Management, Project Time Management, and

Project Integration Management as the 3 project management knowledge areas. The 3 project management knowledge areas were selected in the development of the PM686A course deliverables and carried through PM686B course deliverables development. The demonstration of knowledge management area is described the lessons learned section of this paper.

The project, selected in PM 686A, is a topic of the students choice which can be completed in the two semesters.

The Project Manager has selected a project which will aid in BP PMT front end loading (FEL) alignment of stakeholders through the CVP Appraise stage. BPXA is responsible to progress Cat A, B, and C projects through the CVP Stage gated project development process which consists of Appraise, Select, Define, Execute, and Operate.

BP has started a process improvement initiative to improve the utilization of Cat C projects capital resources by executing project more efficiently. This initiative was named Cat C defined practice. The initiative consists of clearly defined FEL deliverables and development through the Appraise, Select, Define, and Execute stages of CVP.

### **3. Literature Review**

The Literature research sources comprised of the existing BP Project Cat A and B Business Objective Prioritization processes to gain understanding of background and current strategies. Initial literature research focused on business objective selection criteria and then led into prioritization of business objectives selection.

#### **3.1. Category A and B Projects Objectives Prioritization**

Project Manager acquired the current BP Cat A & B Setting Business Priorities, Value Improving Practices, and Effective Management Practices & Lessons Learned Program guides from the BPXA subject matter experts (SME's). Upon Project Manager review and discussion with SME's a clear understanding of BPXA Cat A and B operations' responsibilities for CVP FEL process was attained.

BPXA currently follows a CVP FEL process to set business objectives. The GPO organization in Alaska defines the project FEL objectives for Cat A and B projects in BPXA. The Cat A projects are supported at \$250,000,000 (\$250MM) net BP and greater. Cat B projects are supported at greater than \$15,000,000 (\$15MM) but less than \$250MM BP net. BP net is the total funding requirement by BP individually. Other associated funding in addition to BP net will be provided by other owners in specific oilfields if it is approved.

The Cat A and B defined process governs not only how projects will be planned, executed, and constructed; it also governs records management, communication, and interdisciplinary coordination between all the BP functions. The BP functions consist of finance, legal, project services, procurement supply chain management (PSCM), project services, FEL, discipline capability engineering, construction, commissioning, and operations. PSCM consists of procurement, contracting, and logistics.

Cat A & B projects typically go through a formal request process between the various functions. This formal process can be time consuming and lead to duplication of effort. However, the scope of the projects and the time required for CVP needs the greater formality and structure. Cat A and B can take 3-15 years to progress through the CVP process.

### 3.2. Category C Projects Objectives Prioritization

Project Manager acquired the current BP Cat C Practitioner Roll-Out Program guide with several Setting Business Priorities, Business Case Assessment examples practiced at other BP assets outside the United States. Project Manager also acquired the Preliminary Cat C Execution Strategy under development by the BP Risk Assurance Manager. Upon Project Manager's review, a discussion with the SME's, and the BPXA Sponsor produced a clear understanding of the BPXA Cat C operations' responsibilities. The CVP FEL process deliverables were also obtained.

BPXA currently follows a CVP FEL process to set business objectives also. PMT is responsible for adhering to the CAT C defined practice and the common process. The Cat C defined process, as with CAT A and B, utilizes the same functions of finance, legal, project services, procurement supply chain management (PSCM), project services, FEL, discipline capability engineering, construction, commissioning, and operations.

The team approach is necessary to expedite the CVP process due to the short time interval presented in Project Initiation Request (PIR) to the beginning of construction efforts. The team required to complete the CVP FEL tasks works closely with one another and in close proximity to each other. This approach allows for free flowing communication and streamlined documentation. This enables the team to effectively communicate and develop FEL documents accurately and efficiently. Cat A and B projects can take 3-15 years to complete and BPXA PMT team is typically allowed to complete the Cat C projects with-in 12-24 months.

The Cat C budget boundaries range from \$250,000 (\$250M) to \$15,000,000 (\$15MM). The current strategy to categorize the Cat C projects is listed for C1: \$8MM - \$15MM; C2: \$1.5MM - \$8MM; and C3: \$250M - \$1.5MM. Each category requires the CVP process to be followed through Appraise, Select, Define, Execute, and Operate stages. Additionally project complexity plays a role in categorization of C1, C2, and C3.

The BP Global Cat C common process lays out the CVP stage gate process for C1, C2, and C3 projects. Categories C1 and C2 deliverables are combined in Exhibit 1 illustrated below:

BP Global Cat C Common Process (C1 and C2)					
Prep for Appraise	Appraise	Select	Define	Execute	Operate
PIR	SOR BCA SBP PEP SHR PDC DSP	SOR BCA SBP CSR CRR PEP SHR PDC BOD PSSC DSP	PEP SHR PDC BOD PSSC DSP	CRC DSP	COR

PIR (Project Initiation Request), SOR (Statement of Requirements), BCA (Business Case Assessment), SBP (Setting Business Priorities), PEP (Project Execution Plan), SHR (Stake-Holder Relationship), PDC (Project Deliverable Checklist), DSP (Decision Support Package), CSR (Concept Selection Report), CRR (Construction Readiness Review), BOD (Basis of Design), PSSC (Project Safety Study Checklist), CRC (Construction Readiness Checklist), COR (Close-Out Report)

Exhibit 1 – BP Global Cat C Common Process (C1 and C2)

Category C3 deliverables are combined in Exhibit 2 illustrated below:

BP Global Cat C Common Process (C3)				
Prep for Appraise	Appraise/Select	Define	Execute	Operate
PIR	SOR BCA SBP CSR CRR PEP SHR PDC BOD PSSC DSP	PEP SHR PDC BOD PSSC DSP	CRC DSP	COR

PIR (Project Initiation Request), SOR (Statement of Requirements), BCA (Business Case Assessment), SBP (Setting Business Priorities), PEP (Project Execution Plan), SHR (Stake-Holder Relationship), PDC (Project Deliverable Checklist), DSP (Decision Support Package), CSR (Concept Selection Report), CRR (Construction Readiness Review), BOD (Basis of Design), PSSC (Project Safety Study Checklist), CRC (Construction Readiness Checklist), COR (Close-Out Report)

Exhibit 2 – BP Global Cat C Common Process (C3)

BP has not fully defined the C1, C2, and C3 program schedule template. BP Risk Assurance Manager in conjunction with BPXA Cat C Manager is in the process of defining the CAT C project deliverables checklist which will include a project schedule template as described in section 5.1. Standard Methodology to Identify Business Objectives.

## 4. Research Method and Approach to Analysis

### 4.1. Research Method

The Project Manager had identified several BPXA operations personnel whom can serve as SME's to provide expertise in this project scope of work deliverables. The Project Manager had to attain permission from SME's to provide information and participate in project through a consent form. The consent form listed the principal investigator, description of project, voluntary nature of participation, confidentiality clause, benefits, risks, can contact information.

The Project Manager released the letter of consent form to each of the SMEs' positions as listed:

BP Operations Facility Planner  
BP Project Advisor  
BP Project Development Lead  
BP Appraise/Select Manager  
BP Project Risk Assurance Manager  
BP OPS Mech, Civil & Lift Engineering Team Lead  
BP Development Team Lead – PRP  
CH2M Hill Energy & Chemicals Pt. Thomson NS Installation Project Engineer

Note: The names of the SME's have been removed as specified in confidentiality clause in letter of consent form.

The project consent form is located in Appendix B. Consent Form.

The Project Manager developed a survey to submit to the SME's to gain a documented response to the subject. The Project Manager allowed one working week for the SME's to respond. The Project Manager also had to coordinate with the SME's to schedule a follow-up one-on-one interview. This follow up interview meeting was a challenge as all stakeholders in the meeting had very busy schedules.

Five follow-up one-on-one interview meetings were conducted with the SME's who responded to the survey request. Several interviews between Project Manager and SME's from BPXA Cat A, B, and C operational functions were conducted. The SME's provided their detailed view points on the subject. The interviewees were a mixture of advisors, development leads, managers, and team leads all of whom apply the front end loading (FEL) engineering approach to develop business objectives and prioritize projects accordingly.

The Project Manager also reached out to other SME's in Alaska within two other large companies with an ownership interest in Prudhoe Bay. The Project Manager wanted the other owners in Alaska to provide their organization's priority strategies with similar budget boundaries. These SME's did not respond to the letter of consent so the Project Manager did not release the project survey.

The project survey is located in Appendix C. Project Survey

## **4.2. Approach To Analysis**

A qualitative deductive approach was used to analyze the information gathered through literature research and interview data collection process. The analysis approach was selected because of Project Manager circumstances which lead to project data consolidation and review. The Project Manager submitted a survey to the SME's. The Project Manager used the research questions to group the data and then look for similarities and differences. Time to gather the survey question data was limited.

The Project Manager followed the general procedures to complete the qualitative deductive analysis. The procedures to complete analysis consisted of:

1. Began with preliminary theories – The Project Manager gathered Appraise and Select stage Cat A, B, and C data and formulated a preliminary approach to define Cat C SBP guidelines.
2. Tested the theories – The Project Manager collaborated with the BP Project Risk Assurance Manager to administer the preliminary SBP guidelines to six projects in Appraise and Select stage projects.
3. Revised the theories – The Project Manager and BP Project Risk Assurance Manager both agreed the Cat C SBP guidelines can be standardized for Appraise stage. Select stage SBP guide will require more time to generate and test against more projects progressing through Select Stage.
4. Organized findings based on revised theories – The Project Manager has organized the findings and applied the Appraise stage SBP lessons learned into a step by step application tool.

The research methods and analysis approach provided the foundation to design an analytical hierarchical process matrix, develop a business objectives criteria definition, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.



## **5. Results**

The BP Project Risk Assurance Manager determined, with the aid of the Project Manager, the current PMT Cat C Objective Prioritization process required an improved approach through the CVP Appraise, Select, Define, Execute, and Operate stages. The Project Manager provided a preliminary tool to use for the subsequent prioritization for BPXA Cat C1, C2, and C3 projects for the CVP Appraise, Select, Define, Execute, and Operate stages. The preliminary tool is illustrated in Exhibit 3: BPXA PMT Project Flow Deliverables & Schedule Template Format within section 5.1, “Standard Methodology to Identify Business Objectives.”

The preliminary tool will be shared with Cat C Manager after the tool is developed for the PM 686A and PM 686B course deliverable. Application of the tool for BP’s category C projects will commence after CAT C Manager agrees with approach to define business objectives, quantifying business drivers, and provide assistance with prioritization.

The Project Manager also implemented a step-by-step tool to define business objectives and quantify the business drivers. The tool generated will be applied to the Appraise stage gate deliverables. This tool is comprised of a Spider Diagram, Paired Comparison, and Business Case Assessment. Upon acceptance of this body of work, it will then be used to advance into the Select stage.

### **5.1. Standard Methodology to Identify Business Objectives**

The following table is an illustration of the Stage-Gated Project Development Process. The table illustrates the difference in planning approach and work product sequence between C1, C2, and C3 generated for BPXA PMT. The complexity of each Cat C category is readily apparent by the number of required individual work products within each CVP stage. The complexity combined with the assigned dollar value will define whether the project is categorized as C1, C2, or C3.

BPXA PMT team is comprised of five separate specialties. These are identified as Core, Automation Fire & Gas (AF&G), Control Systems, Turn-Around (TAR), and Well Tie-In (WTI). All specialties are responsible to follow the stage gated process.

The table represents the basis for the project schedule guidance. The table also shows the percentage complete at which the deliverables are required to be progressed at each of the stage gates.

BPXA PMT Project Flow Deliverables & Schedule Template Format			
	Category C1 (\$8MM-\$15MM)	Category C2 (\$1.5MM - \$8MM)	Category C3 (\$250M - \$1.5MM)
1.	PIR BCA Funding Source	PIR BCA Funding Source	PIR BCA Funding Source
2.	Set-Up Assign Project Number Assign Project Lead	Set-Up Assign Project Number Assign Project Lead	Set-Up Assign Project Number Assign Project Lead
3.	CVP Deliverables Appraise 1. SOR 30% 2. BOD 30% 3. SBP/BCA Select 1. SOR 100% 2. BOD 70% 3. PDC 30% 4. RM Draft 30% 5. KM/LL Draft 30% 6. Schedule Level 2 7. PEP 30% 8. PDC 30% 9. CSR 100% 10. PSSC 50% 11. SBP/BCA Define 1. RM 100% 2. KM/LL 100% 3. SOR 100% 4. BOD 100% (Scope Freeze) 5. PSSC 100% 6. QP 70% Execute 1. CRC 100% 2. QP 100% 3. CRR Operate/GOC Process 1. KM/LL Continuous Improvement (CI) Loop 2. RM Closeout 3. Records Management	CVP Deliverables *Appraise/Select 1. SOR 30% 2. BOD 30% 3. SBP/BCA 4. PDC 30% 5. DSP 6. CSR 100% Define 1. SOR 100% 2. BOD 100% (Scope Freeze) 3. PDC 100% 4. QP 75% 5. RM 30% 6. KM/LL 30% 7. SBP/BCA Execute 1. CRC 100% 2. QP 100% 3. CRR 4. RM 100% 5. KM/LL 100% Operate/GOC Process 1. KM/LL CI Loop 2. RM Closeout 3. Records Management	CVP Deliverables Appraise/Select 1. SOR 30-90% 2. BOD 30-90% 3. BCA Define/Execute 1. SOR 100% 2. BOD 100% (Scope Freeze) 3. QP 100% 4. KM/LL 100% 5. CRC 100% 6. CRR Operate/GOC Process 1. KM/LL CI Loop 2. RM Closeout 3. Records Management

CVP (Capital Value Process), PIR (Project Initiation Request), SOR (Statement of Requirements), BCA (Business Case Assessment), SBP (Setting Business Priorities), PEP (Project Execution Plan), SHR (Stake-Holder Relationship), PDC (Project Deliverable Checklist), RM (Risk Management), KM/LL (Knowledge Management/Lessons Learned), DSP (Decision Support Package), CSR (Concept Selection Report), CRR (Construction Readiness Review), BOD (Basis of Design), PSSC (Project Safety Study Checklist), QP (Quality Plan), CRC (Construction Readiness Checklist), COR (Close-Out Report)

\*Appraise/Select: The stage gate requires Appraise and Select are completed separately but may be assessed together.

### Exhibit 3 - BPXA PMT Project Flow Deliverables & Schedule Template Format

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## 5.2. Setting Business Priorities and Business Case Assessment

During the first step of the project schedule template (Exhibit 3) is the creation of the PIR, the BCA, and identification of the funding source. Once the project is identified, the initiator of the concept will examine facility optimization, future facility use, reliability and operability, and current production. The project must generally meet one or more of these business objectives in order for the project to be entered into the project portfolio. The business objectives will be assessed and incorporated into the BCA.

The first objective of the SBP is determining stakeholder alignment. A stakeholder is the person, or organization that is actively involved in the project, or whose interests may be positively or negatively affected by execution or completion of the project. A Project Manager will be better able to control scope creep, ensure project requirements are aligned, understand tolerance for risk, and mitigate issues that would otherwise delay the project through proper stakeholder alignment.

The output of the stakeholder alignment exercise is a spider diagram. Webbing on the spider diagram indicates the status of each decision quality component. Low alignment scores are toward the center. The goal is to do additional work on the low alignment scoring components and move the webbing of the spider diagram towards 100%. As the team of stakeholder's results approach 100%, the team is becoming decision ready, recognizing that cost of further work does not improve decision quality. As stakeholder alignment increases the spider diagram will reflect this by becoming more circular filling in the entire circle.

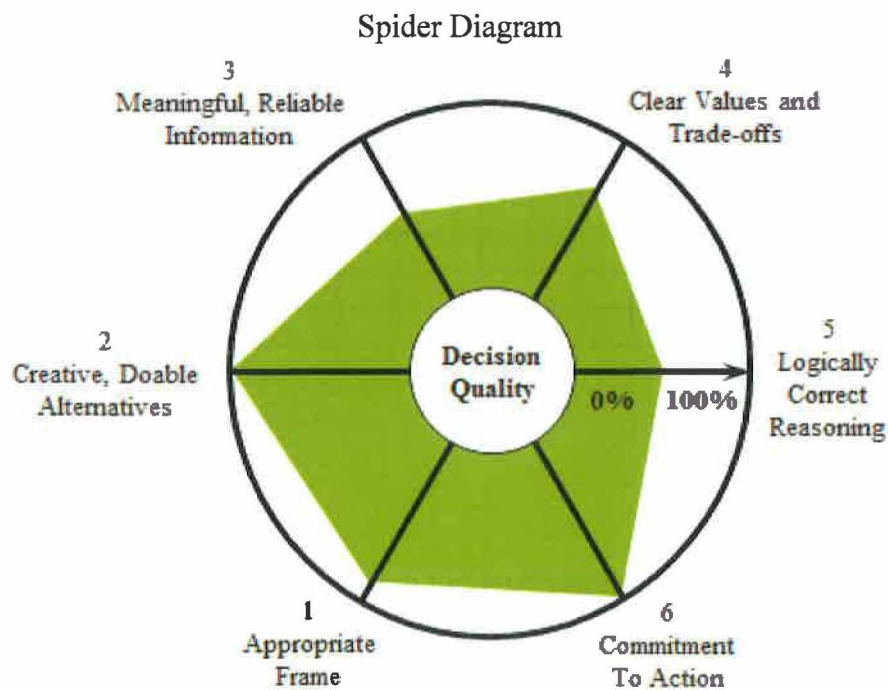


Exhibit 4 – Spider Diagram Example

Once stakeholder alignment is achieved, the stakeholder team can move forward with SBP. SBP is an industry recognized Value Improving Process (VIP) that can be used to improve the quality of a project's front end. SBP

uses a communication process to identify stakeholders' requirements and expectations for a business opportunity and then through discussion giving them relative priorities including the relevant business strategy and plan for the asset involved. It is important that representation from all key stakeholders is involved in the discussions. The output is alignment of project team with the stakeholders around a much clearer documented definition of the project objectives and their relative priority.

This provides an:

- Enhanced appreciation of stakeholders requirements and objectives
- Higher quality of Front End Loading to meet stakeholders' requirements
- Continuity of focus on stakeholders' requirements through CVP stages
- Consistency among individual team members' daily execution decisions

SBP requires at least one facilitated session to include:

- Recognition of stakeholders and their requirements and expectations
- Definition of project objectives and their relative importance

SBP is required in Appraise with a focused check in Select and Define that the project is focused on the business priorities / objectives and their relative importance. Responsibility for SBP resides with the individual who has the leadership role in executing the project, typically the Project Engineer/Lead. Both the core and extended project teams should participate.

The tool used in a SBP session for establishing priority is the paired comparison tool. The paired comparison tool is comprised of:

- List all of the relevant objectives
- Two at a time, the assembled team assesses the relative importance of one objective versus the other and identifies which is more important for the project, and by how much
- Once all of the comparisons are complete, the results are tallied, and a percentage weight is determined.

Category C Projects Paired Comparison Tool													Description	Score	%
	B	C	D	E	F	G	H	I	J	K	L	M			
A	B3	C2	D2	E1									Project Cost	0	0%
	B	B3	B2	B2									Project Schedule	10	48%
		C	D2	E2									Overall Capacity	2	10%
			D	D2									Reliability - Maintenance	6	29%
				E									Availability	3	14%
													Total	21	100%

Priority Scale	
3	High
2	Medium
1	Low

Exhibit 5 – Category C Projects Paired Comparison Tool

The BPXA Cat C1, C2, and C3 projects business drivers will be standardized through Appraise stage. The Appraise stage business drivers will be listed as:

- Project Cost: Total Cost
- Project Schedule: Total Duration to Complete
- Overall Capacity: Team Resources to Complete
- Reliability – Maintenance: Solution is Reliable and Maintainable

- Availability: Execution Affects Operational Production

This example illustrates the priority at which the business drivers are ranked. Business drivers are ranked as listed:

- #1 – Project Schedule at 48%
- #2 – Reliability – Maintenance at 29%
- #3 – Availability at 14%
- #4 – Overall Capacity at 10%
- #5 – Project Cost at 0%

After the paired comparison exercise is complete, the BCA should be updated and reviewed by stakeholders to validate BCA content. The BCA contains the reasons why the organization is committing people and resources to a project. It compares the benefits of the project to its costs or otherwise presents a business case for proceeding with a project documenting the drivers, assumptions, and constraints. The project business case can be compared to that of other projects of similar business driver classification to determine if it should proceed or be terminated, or possibly confirm its relative sequence in the portfolio.

The BCA is initiated in the Appraise stage. It is updated in the Select stage based on the selected project option. At the end of Define stage the BCA should be confirmed based on the definitive cost estimate and the summary findings recorded in the DSP.

The BPXA Cat C3 projects can progress through FEL stages on a single issue of the BCA. The BCA can consider the range of possible business case outcomes (say the P10 and P90 risk reduction or NPV values). It is recommended that this form is drafted early in Appraise so that the questions it provokes will identify issues or work with more time to plan and address them.

## 6. Conclusion

Based on the empirical evidence gathered from the application of the Minimum Conditions of Satisfaction (MCOS), PMT increased the efficiency by 22% as compared to the baseline. The initial application of the Cat C Define Practice procedure and the refinement of the procedure as outlined in this paper will significantly improve efficiency. Based on the data gathered from the first 6 projects that the prioritization tool was applied; an efficiency increase of additional 20% is anticipated.

The tools developed by the Project Manager as illustrated in Exhibit 3 - BPXA PMT Project Flow Deliverables & Schedule Template Format and Exhibit 5 – Category C Projects Paired Comparison complete project deliverables requirements for PM 686A and PM 686B courses.

## 7. Recommendation

The Project Manager recommends the BPXA PMT Project Flow Deliverables & Schedule Template be presented to the Cat C Manager after the PM686B class course concludes.

The Project Manager also recommends development of the Select stage standard SBP process. Standardization of Select stage project drivers should be the goal. Apply lessons learned from project analysis and data collection to aid with standardization of Select stage business drivers.

## 8. Lessons Learned

Lessons learned is the learning gained from the process of performing a project. Formally conducted lessons learned sessions are traditionally held during project close-out, near the completion of the project. However, lessons learned



may be identified and documented at any point during the project's life cycle. The purpose of documenting lessons learned is to share and use knowledge derived from experience to:

- Promote the recurrence of desirable outcomes
- Preclude the recurrence of undesirable outcomes

As a practice, lessons learned includes the processes necessary for identification, documentation, validation, and dissemination of lessons learned. Utilization and incorporation of those processes includes identification of applicable lessons learned, documentation of lessons learned, archiving lessons learned, distribution to appropriate personnel, identification of actions that will be taken as a result of the lesson learned, and follow-up to ensure that appropriate actions were taken.

Lessons learned should draw on both positive experiences— good ideas that improve project efficiency, and negative experiences— lessons learned only after an undesirable outcome has already occurred. Every documented lesson learned should contain at least these general elements:

- Project information and contact information for additional detail
- A clear statement of the lesson
- A background summary of how the lesson was learned
- Benefits of using the lesson and suggestion how the lesson may be used in the future

Lessons learned was documented throughout development of PM 686A and PM 686B courses.

Section below contains the constructive lessons learned and positive key observations. Both lessons learned and key observations account for project lessons learned. Each lessons learned and key observation will be listed followed with a short description.

#### Constructive Lessons Learned

- Project Manager start IRB research and submittal process sooner – Time allotted in project schedule to prepare IRB submittal, advisor review, and final documents submittal had taken longer time than Project Manager had anticipated. Project Manager discussed IRB submittal process with two other MSPM student colleagues to understand initial UAA administration IRB approval issues. Fortunately UAA administration IRB approval issues were discussed and a plan was implemented by the time Project Manager submitted IRB final deliverables.
- Project Manager did not account for all business related North Slope trips through execution of PM 686A course– Project Manager was not able to adjust schedule tasks to accommodate final IRB submittal date. Project Manager North Slope trip negatively impacted project schedule final IRB deliverable date by two days. If Project Manager had started initial IRB training a week sooner, final IRB submittal date would have been met.

North Slope business trips were accounted for through execution of PM686B schedule. A larger task duration contingency was incorporated into project execution schedule.

- Project Manager did not account for the increased business responsibilities through execution of PM686B course- Project Manager was not able to meet PPM #1, #2, and #3 submittal dates as listed in PM 686B syllabus. Project Manager implemented the change management plan and updated the project risk register to acquire approval from project Advisor to continue with PM686B course.
- BPXA Legal approval must be given for any external paper or document to ensure confidential and proprietary information is not released. Project Manager planned to obtain BPXA Legal Counsel approval earlier in project schedule – Project Manager assumed project scope of work deliverables would not contain proprietary information to BPXA and Legal Counsel approval would be acquired in a timely manner.

Project advisor recommended Project Manager acquire legal counsel approval after Project Charter, Research Sources and Key Words, and Description of Expected Research Methods, Results, and Approach to Analysis documents were completed and submitted.

Project Manager assumed legal counsel approval would be acquired quickly. Project legal counsel initial approval had taken several weeks to obtain. Project Manager had to submit all PM 686A PPM deliverables to BPXA PMT Team Lead (TL) and PMT Engineering Manager for review and approval. Project Manager had to attain permission to submit PM 686A deliverables to BPXA Legal Department. Once PM 686A deliverables were submitted to BPXA Legal Department, an appointed Legal Advisor had to be identified by BPXA Legal Department Head.

Legal Advisor review meeting was at discretion of appointed Legal Advisor. Fortunately PM 686A PPM deliverables were approved and Project Manager allowed to progress forward with project. Time to attain initial BPXA Legal approval exceeded Project Manager's task duration identified in project schedule. BPXA Legal Counsel final project deliverables approval was required prior to Project Manager making the submittal to UAA administration department. Project Manager identified BPXA Legal Counsel approval tasks and incorporated into PM686B project execution schedule.

#### Positive Key Observations

- Microsoft Project and WBS Chart Pro have advanced to allow automatic sync – Advances in task application and modification of both programs made updates more efficient than Project Manager had anticipated. Project Manager was able to focus on other PPM project deliverables which resulted in higher quality deliverables.
- Critical to provide scope statement early to committee advisory team members to review/comment to allow Project Manager to clearly define scope of work boundaries – Project Manager was able to submit initial project scope statement early in PPM deliverables process to allow thorough review by project committee members. As a result, project committee members were able to submit comments and Project Manager was able to follow up with scope statement discussion meetings which enabled all parties to agree with project scope statement and project deliverables. Project boundaries and constraints also further defined through project team member collaboration process.
- Communications plan determined early with project committee members allowed for prompt feedback – Project Manager and committee members established communications plan early to define formal and informal communication techniques. Project committee members required different PPM document distribution strategies. One committee member preferred the UAA collaboration area web site and the other committee member required E-mail distribution. Project Manager accommodated both requests and incorporated PPM document distribution strategies into project management plan.

PPM document distribution strategies allowed Project Manager to distribute PPM deliverables efficiently. PPM document distribution strategy also allowed project committee members access to PPM deliverables in timely manner which enabled more time to review and comment.

- Proper scheduling of tasks and subtasks allowed for project execution efficiencies – The defined project schedule established early enabled the Project Manager to complete tasks in a timely manner. The defined project schedule also listed advisory committee member subtasks. The Project Manager was able to verify and inform advisory committee members of their responsibilities and send requests via formal and informal communication techniques as established in project management plan.

The project schedule was utilized as a planning tool to define project deliverables and completion dates as required to satisfy PM 686A and PM 686B syllabi deliverables. The project schedule enabled the Project Manager to work the project management plan.

- Adhering to change management plan restricted scope creep - The project advisor and a committee member both recommended implementation of prioritization tool as part of final project deliverables. Project Manager had discussions with project sponsor on implementation of prioritization tool when project charter was under development. Project sponsor suggested not implementing tool as approval to change current BPXA prioritization process would require BPXA administrative and perhaps BPXA legal approval which would require more time than what is specified in UAA Master of Science in Project Management (MSPM) PM686A and PM686B curriculum. Project Charter states implementation of Cat C business objectives evaluation tool is out of project scope.

The project change management plan as specified in the project management plan requires project sponsor approval prior to making any scope changes as specified in project charter. Advisor committee request to implement project prioritization tool as part of final project deliverables was respectfully denied. Project Manager adhered to change management plan which enabled decision not to take on additional scope request by advisory committee members.

- BPXA SME support – The Project Manager had identified BPXA subject matter experts to receive project survey and serve as interviewees. Project Manager had distributed project consent forms to and received signed copies from SMEs. Project Manager acquired SME support to start interview process as specified in PM 686A and PM686B course deliverable “Description of Expected Research Methods, Results, and Approach to Analysis.”



## 9. References

- Construction Industry Institute (2007). *Effective Management Practices and Technologies for Lessons Learned Programs*
- Project Management Institute. (2013). *A guide to the project management body of knowledge (PMBOK guide)*. Newtown Square, Pa: Project Management Institute.
- Independent Project Analysis, Incorporated (2005). *Guide to Value Improving Practices (VIPS)*
- Ragan, F. (2013) *Cat C Practitioner Roll-Out*
- Schulte, R. (2013) *What is Setting Business Priorities Value Improving Practice in Cat C?*
- Leonard, S. (2014) *Setting Business Priorities (SBP)*
- Shea Writing Solutions Inc. (2014) *Business Case Assessment (BCA)*

## **10. Appendices**

### A. Category C Projects Paired Comparison Tool

Project Title :	
Project Number:	
SBP Doc.Number:	

A	B	C	D	E	F	G	H	I	J	Description	Score	%
										Project Cost	0	
B										Project Schedule	0	
	C									Overall Capacity	0	
		D								Reliability - Maintenance	0	
			E							Availability	0	
										Total	0	

Priority Scale	
3	High
2	Medium
1	Low

**B. Consent Form**

**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**  
**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_

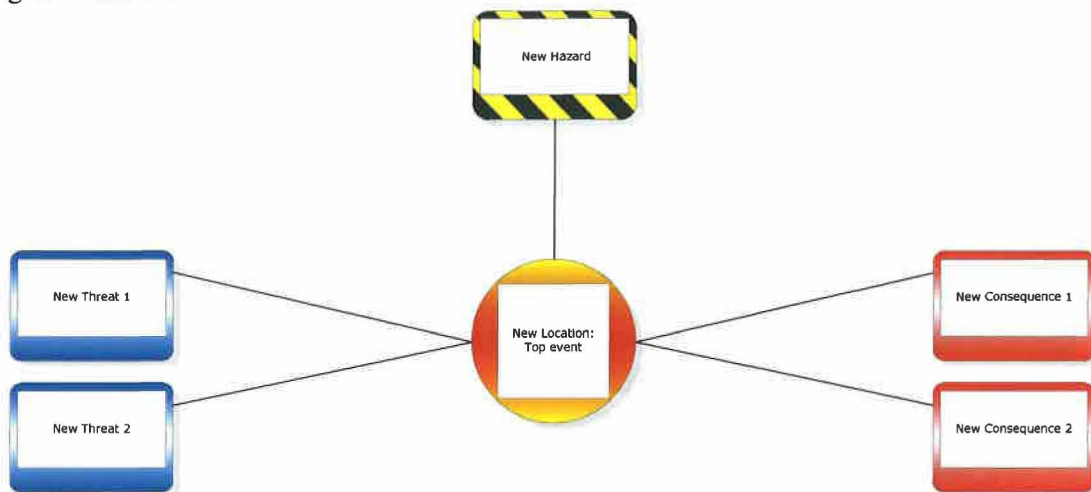
A copy of this consent form is available for you to keep.

## C. Project Survey

### Surveys

A survey questionnaire was distributed to subject matter experts (SMEs) with a follow-up one-on-one interview to discuss responses. Survey questions are as listed below:

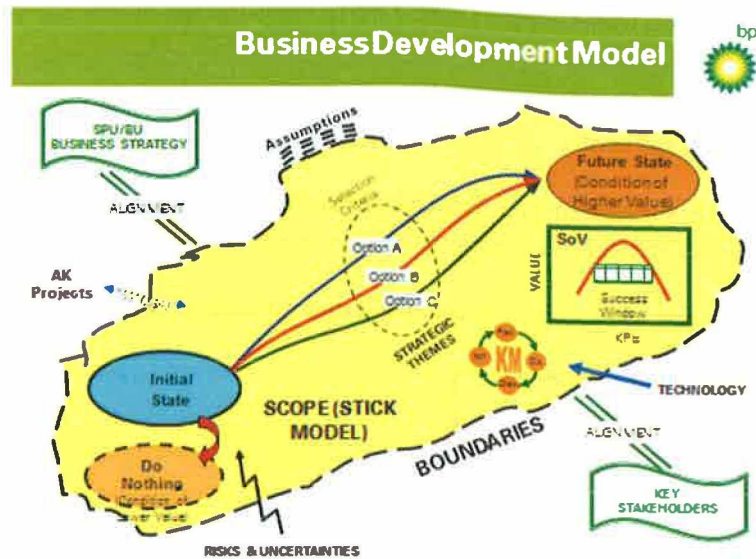
1. Setting business priorities (SBP) can be a time consuming exercise: what does SBP offer the project lead and their team on projects both large and small?
2. There are four main categories of risk (financial, non-financial, environment, health safety and security) to look at for each project, what are examples of risk in each of the main categories?
3. How is the Bow Tie (risk analysis and SBP) method of communication valuable in determining a risk to a given situation?



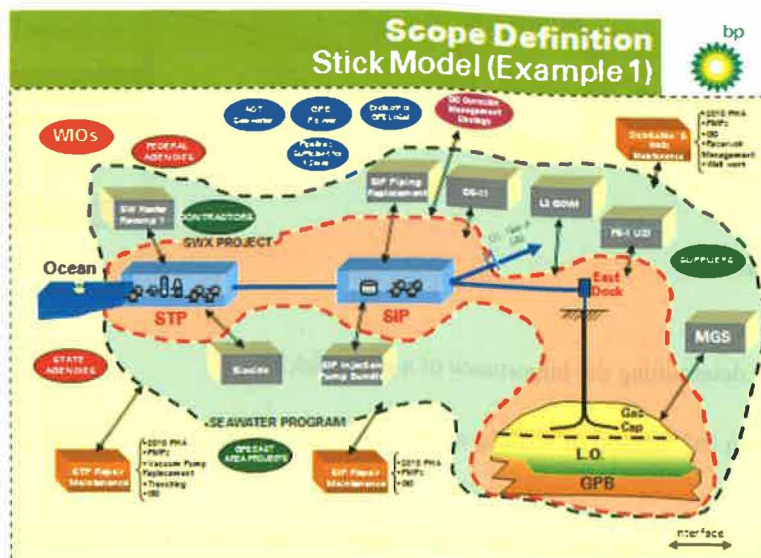
**Figure 1.1. Bow Tie Method**

4. How is risk ranking helpful in determining the importance of a given risk?
5. Discuss the "If, Then, Resulting In" method of writing a risk statement. How can this be tied to the Bow Tie method?
6. During the SBP process, three overarching categories of decisions are considered; those being Overriding, Tradable, and Optional. What are the differences between the three categories and how do they contribute to building a value case for Cat C projects ranging from \$500K to \$15MM?
7. How does a project team frame a discussion within SBP or a project risk assessment? How would you apply to Cat C Projects?
8. What are the main value measures used to make decisions within the SBP process for application to Cat A and B? How can these value measures be applied or modified to address Cat C needs?

Please review stick models illustrated below:



### Figure 1.2. Stick Model Example



### Figure 1.3. Application of Stick Model for \$75MM Project

9. What elements of the stick model examples are helpful when developing business drivers for Cat C projects?
10. How can SMART (Specific, Measureable, Attainable, Realistic, Timely) method be applied to assist in selection of Cat C project objectives?







# DEVELOPMENT OF A PRIORITIZATION TOOL FOR BP EXPLORATION (ALASKA) INC. CATEGORY C PROJECTS

By Carlos Lujan

CARLOS LUJAN, MPM STUDENT  
PM655A & PM655B FINAL PRESENTATION

12/2/2014

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## CONTENTS OF PRESENTATION

- Introduction – BP Exploration (Alaska) Inc. Priorities / Strategy
- Projects & Modifications Team (PMT)
- Project Description, Purpose, & Objective
- Project Charter Scope, Duration, & Cost
- Assumptions & Constraints
- Work Breakdown Structure
- Project Management Plan
- Research Methods & Analysis Approach
- Project Deliverables, Conclusion, Recommendations
- Lessons Learned & Key Observations

## INTRODUCTION

### BP Exploration (Alaska) Inc. (BPXA) Priorities / Strategy



- **50** percent reduction in incidents
- **ONE team** (Team Alaska)
- **Sustainable and competitive for next 50 year future**

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■The Alaska Region's priorities are a **50** percent reduction in incidents, **ONE team** (Team Alaska) and making us sustainable and competitive for our **50** year future. **50-ONE-50**. These priorities are aligned with the overarching BP Strategy.



- 50 Year Future
  - Sustainable & Competitive
    - Develop plans and alternatives
      - Increase efficiency
      - Reduce costs
      - Increase capital and cash cost efficiency (stretch dollars)
      - Improve production

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- Develop plans and alternatives that will increase our overall efficiency with the aim of lowering costs, increasing capital and cash cost efficiency (stretching our dollars farther), and improving production
- Project objective aligns with statement

## BPXA PROJECTS & MODIFICATIONS TEAM (PMT)

### BPXA PMT

- Front end loading (FEL) engineering & construction planning
- Category (Cat) "C" projects (range from \$250,000 - \$15,000,000)

### CVP Process

- Pre-Appraise → Appraise → Select → Define → Execute → Operate

### Project Focus

- Appraise Stage

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- BP Capital Value Process (CVP) – Stage gated process through funding, engineering/design, procurement, construction, and close-out
- Pre-Appraise – Project prioritized Cat A, B, or C
- Appraise – Clarify Business Objective
- Project focuses on Appraise Stage

## DEVELOPMENT OF A PRIORITIZATION TOOL FOR BPXA CAT C PROJECTS

### Project Description

- Oil and gas production declining
- Capital resources utilized with greatest efficiency
- BPXA objective improve utilization of Cat C projects capital resources

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- Project description aligns with BP Exploration Alaska Priorities / Strategy
- 50 Year Future
  - Sustainable & Competitive
  - Develop plans and alternatives that will increase our overall efficiency with the aim of lowering costs, increasing capital and cash cost efficiency (stretching our dollars farther), and improving production

## DEVELOPMENT OF A PRIORITIZATION TOOL FOR BPXA CAT C PROJECTS

### Project Purpose

- Develop and clarify business objectives ensuring only BPXA Cat C projects with strong business drivers will be funded
- Approach will ensure that fit-for-service improvements are selected for execution

## DEVELOPMENT OF A PRIORITIZATION TOOL FOR BPXA CAT C PROJECTS

### Project Objectives

- Provide a step-by-step BPXA Cat C project assessment tool
  - Provide an instrument to use for subsequent prioritization
  - Define business objectives
  - Quantify business drivers
- Enhance prioritization method for BP Cat C projects with results from business objectives evaluation
- Support BPXA Cat C defined practice



## PROJECT CHARTER SCOPE

IN SCOPE
Research & analyze BPXA Cat A & B business objectives criteria
Analyze current prioritization for BPXA Cat C projects
Define interview questions for SMEs
Conduct interviews
Compile & evaluate interview results
Develop a standard methodology to identify business objectives for Cat C projects
Design a business objectives criteria definition checklist & matrix
Assemble paper which illustrates Cat C business objectives evaluation tool

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- The project was developed using an analysis of existing BP Cat A and B business objectives and prioritization literature provided background information on current strategies.
- Analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process.
- The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were reached out to be examined.

## PROJECT CHARTER SCOPE

### OUT OF SCOPE

Suggestions to enhance Cat A & B business objective evaluation methodology
Analyze prioritization methods outside oil & gas industry
Conduct interviews outside oil & gas industry
Implementation of Cat C business objectives evaluation tool

# PROJECT DURATION AND COST

PM686A

Initiating

Planning

- Duration: January 2014 – April 2014
- Tuition Cost: \$2,500
- Labor Cost: \$0

# PROJECT DURATION AND COST

PM686B > Executing > Controlling > Closing

- Duration: May 2014 – December 2014
- Tuition Cost: \$2,500
- Labor Cost: \$0

## PROJECT ASSUMPTIONS & CONSTRAINTS

### ASSUMPTIONS

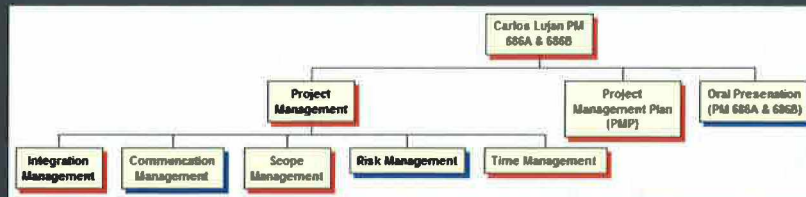
- Project Manager - access to software programs (Microsoft Project, WBS Chart Pro, Blackboard, Backbone)
- Advisors – timely constructive feedback on draft project deliverables
- SMEs - receptive and willing to participate in the interview process
- Project Stakeholders - adequate time to review and approve project deliverables
- Project Manager – project deliverables no risk of proprietary BP information

## PROJECT ASSUMPTIONS & CONSTRAINTS

### CONSTRAINTS

- Project Progress Milestone (PPM) dates as specified in 686A and 686B syllabi
- Advisor and committee members time availability

## WORK BREAKDOWN STRUCTURE



### Application & Performance of 3 Project Management Knowledge Areas

- Integration Management
- Communications Management
- Time Management

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- High level view of project WBS
- Subtasks not listed
- Refer to Project Management Plan for further details
- PM 686A and PM686B Class 100% complete as of 12/02/14

## PROJECT MANAGEMENT PLAN

1. Project Scope Statement
2. Project Risks
3. Project Deliverables and Milestones
4. Work Breakdown Structure
5. Human Resource Management Plan

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- Numbers signify Table of Contents numbering scheme



## PROJECT MANAGEMENT PLAN

6. Communications Management Plan
7. Project Monitor and Control Plan
8. Change Management Plan
9. Project Close-Out
10. Lessons Learned

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- Numbers signify Table of Contents numbering scheme

## RESEARCH METHODS

### Literature Review

- BPXA Project Category (Cat) A and B Business Objective Prioritization processes
  - Business objective selection criteria
  - Prioritization of business objectives selection

### Survey with Follow-Up Interview

- Subject Matter Experts (SMEs)
  - BPXA Cat A and B Global Projects

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- Literature review was conducted to determine if current Cat C Objective Prioritization process has been developed to ensure originality of the project or to formulate an improved approach to current Cat C Objective Prioritization process.
- The interviewees are a mixture of planners, advisors, development leads, managers, and team leads all of whom apply the front end loading (FEL) engineering approach to develop business objectives and prioritize projects accordingly.
- BP Exploration Alaska SMEs identified early on in PM 686A.

## ANALYSIS APPROACH

### Qualitative Deductive Analysis

- Guidelines for selecting deductive analysis approach
  - Use research questions to group data and then look for similarities and differences
  - Used when time and resources are limited
- General procedures to complete analysis
  - Begin with preliminary theories
  - Test theories
  - Revise theories
  - Organize findings based on revised theories

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- Began with preliminary theories – The Project Manager gathered Appraise and Select stage Cat A, B, and C data and formulated a preliminary approach to define Cat C SBP guidelines.
- Tested the theories – The Project Manager collaborated with the BP Project Risk Assurance Manager to administer the preliminary SBP guidelines to six projects in Appraise and Select stage projects.
- Revised the theories – The Project Manager and BP Project Risk Assurance Manager both agreed the Cat C SBP guidelines can be standardized for Appraise stage. Select stage SBP guide will require more time to generate and test against more projects progressing through Select Stage.
- Organized findings based on revised theories – The Project Manager has organized the findings and applied the Appraise stage SBP lessons learned into a step by step application tool.

## PROJECT DELIVERABLES

- BPXA Project Flow Deliverables & Schedule Template
  - Preliminary tool to aid with prioritization Cat C projects (C1, C2, C3)
    - Applied to CVP Appraise, Select, Define, Execute, and Operate stages

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- The Project Manager provided a preliminary tool to use for the subsequent prioritization for BPXA Cat C1, C2, and C3 projects for the CVP Appraise, Select, Define, Execute, and Operate stages. The preliminary tool is illustrated as BPXA PMT Project Flow Deliverables & Schedule template.
- The preliminary tool will be shared with Cat C Manager after the tool is developed for the PM 686A and PM 686B course deliverable. Application of the tool for BP's category C projects will commence after CAT C Manager agrees with approach to define business objectives, quantifying business drivers, and provide assistance with prioritization.

## BPXA PROJECT FLOW DELIVERABLES & SCHEDULE TEMPLATE

	Category C1 (\$8MM-\$15MM)	Category C2 (\$1.5MM - \$8MM)	Category C3 (\$250M - \$1.5MM)
1.	PIR, BCA, Funding Source		
2.	Set-Up, Assign Project Number, Assign Project Lead		
3.	CVP Deliverables	CVP Deliverables	CVP Deliverables
	Appraise	*Appraise/Select	Appraise/Select
	1. SOR 30%	1. SOR 30%	1. SOR 30-90%
	2. BOD 30%	2. BOD 30%	2. BOD 30-90%
	3. SBP/BCA	3. SBP/BCA	3. BCA
	Select	4. PDC 30%	Define/Execute
	1. SOR 100%	5. DSP	1. SOR 100%
	2. BOD 70%	6. CSR 100%	2. BOD 100%
	3. PDC 30%	Define	(Scope Freeze)
	4. RM Draft 30%	1. SOR 100%	3. QP 100%
	5. KM/LL Draft 30%	2. BOD 100%	4. KM/LL 100%
	6. Schedule Level 2	(Scope Freeze)	5. CRC 100%
	Define	1. PDC 100%	4. CRR
	1. RM 100%	2. QP 75%	Operate/GOC Process
	2. KM/LL 100%	3. RM 30%	1. KM/LL CI Loop
	3. SOR 100%	4. KM/LL 30%	2. RM Closeout
	4. BOD 100%	5. SBP/BCA	3. Records Management
	5. SSC 100%	Execute	
	6. QP 30%	CRC 100%	
	Execute	QP 100%	
	1. CRC 100%	CRR	
	2. QP 100%	RM 100%	
	3. CRR	KM/LL 100%	
	Operate/GOC Process	Operate/GOC Process	
	1. KM/LL Continuous Improvement	1. KM/LL CI Loop	
	(CI) Loop	2. RM Closeout	
	2. RM Closeout	3. Records Management	
	3. Records Management		

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CVP (Capital Value Process, PIR (Project Initiation Request), SOR (Statement of Requirements), BCA (Business Case Assessment), SBP (Setting Business Priorities), PEP (Project Execution Plan), SHR (Stake-Holder Relationship), PDC (Project Deliverable Checklist), RM (Risk Management), KM/LL (Knowledge Management/Lessons Learned), DSP (Decision Support Package), CSR (Concept Selection Report), CRR (Construction Readiness Review), BOD (Basis of Design), PSSC (Project Safety Study Checklist), QP (Quality Plan), CRC (Construction Readiness Checklist), COR (Close-Out Report)

\*Appraise/Select: The stage gate requires Appraise and Select are completed separately but may be assessed together.





## PROJECT DELIVERABLES

- Logical step-by-step application tool to identify and quantify business objectives
  - Spider Diagram
  - Paired Comparison
  - Business Case Assessment

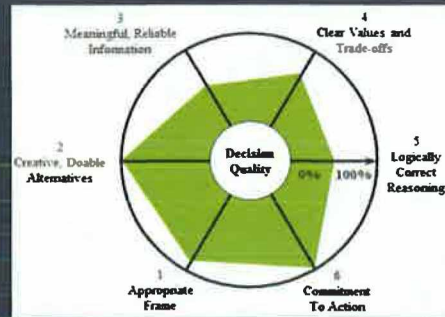
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- The Project Manager also implemented a step-by-step tool to define business objectives and quantify the business drivers.
- The tool generated will be applied to the Appraise stage gate deliverables.
- This tool is comprised of a Spider Diagram, Paired Comparison, and Business Case Assessment. Upon acceptance of this body of work, it will then be used to advance into the Select stage.
- Apply to Appraise Stage gate deliverables

## SPIDER DIAGRAM



- SBP 1<sup>st</sup> Objective – Determine stakeholder alignment
- Lower score toward center
- Goal move webbing toward 100%

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- The first objective of the SBP is determining stakeholder alignment. A stakeholder is the person, or organization that is actively involved in the project, or whose interests may be positively or negatively affected by execution or completion of the project. A Project Manager will be better able to control scope creep, ensure project requirements are aligned, understand tolerance for risk, and mitigate issues that would otherwise delay the project through proper stakeholder alignment.
- The output of the stakeholder alignment exercise is a spider diagram. Webbing on the spider diagram indicates the status of each decision quality component. Low alignment scores are toward the center. The goal is to do additional work on the low alignment scoring components and move the webbing of the spider diagram towards 100%. As the team of stakeholder's results approach 100%, the team is becoming decision ready, recognizing that cost of further work does not improve decision quality. As stakeholder alignment increases the spider diagram will reflect this by becoming more circular filling in the entire circle.



## PAIRED COMPARISON TOOL

	B	C	D	E	F	G	H	I	J	K	L	M	Description	Score	%
A	B3	C2	D2	E1									Project Cost	0	0%
	B	B3	B2	B2									Project Schedule	10	48%
		C	D2	E2									Overall Capacity	2	10%
			D	D2									Reliability - Maintenance	6	29%
				E									Availability	3	14%
													Total	21	100%

Priority Scale	
3	High
2	Medium
1	Low

- Project Cost: Total Cost
- Project Schedule: Total Duration to Complete
- Overall Capacity: Team Resources to Complete
- Reliability – Maintenance: Solution is Reliable and Maintainable
- Availability: Execution Affects Operational Production

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The tool used in a SBP session for establishing priority is the paired comparison tool. The paired comparison tool is comprised of:

- List all of the relevant objectives
- Two at a time, the assembled team assesses the relative importance of one objective versus the other and identifies which is more important for the project, and by how much
- Once all of the comparisons are complete, the results are tallied, and a percentage weight is determined.
- Business drivers are ranked as listed:
  - #1 – Project Schedule at 48%
  - #2 – Reliability – Maintenance at 29%
  - #3 – Availability at 14%
  - #4 – Overall Capacity at 10%
  - #5 – Project Cost at 0%

## BUSINESS CASE ASSESSMENT

- Initiated early in Appraise Stage
- Update with paired comparison data
- Validate content with stakeholders
- Move forward with Select Stage

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- After the paired comparison exercise is complete, the BCA should be updated and reviewed by stakeholders to validate BCA content. The BCA contains the reasons why the organization is committing people and resources to a project. It compares the benefits of the project to its costs or otherwise presents a business case for proceeding with a project documenting the drivers, assumptions, and constraints. The project business case can be compared to that of other projects of similar business driver classification to determine if it should proceed or be terminated, or possibly confirm its relative sequence in the portfolio.
- The BCA is initiated in the Appraise stage. It is updated in the Select stage based on the selected project option. At the end of Define stage the BCA should be confirmed based on the definitive cost estimate and the summary findings recorded in the DSP.
- The BPXA Cat C3 projects can progress through FEL stages on a single issue of the BCA. The BCA can consider the range of possible business case outcomes (say the P10 and P90 risk reduction or NPV values). It is recommended that this form is drafted early in Appraise so that the questions it provokes will identify issues or work with more time to plan and address them.

## CONCLUSION

- Application of Cat C Define Practice and refinement procedure as outlined in project will improve efficiency.
- Based on first 6 projects which prioritization tool was applied; an efficiency increase of 20% is anticipated.

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- Based on the empirical evidence gathered from the application of the Minimum Conditions of Satisfaction (MCOS), PMT increased the efficiency by 22% as compared to the baseline. The initial application of the Cat C Define Practice procedure and the refinement of the procedure as outlined in this paper will significantly improve efficiency. Based on the data gathered from the first 6 projects that the prioritization tool was applied; an efficiency increase of additional 20% is anticipated.
- The tools developed by the Project Manager as illustrated in Exhibit 3 - BPXA PMT Project Flow Deliverables & Schedule Template Format and Exhibit 5 – Category C Projects Paired Comparison complete project deliverables requirements for PM 686A and PM 686B courses.

## RECOMMENDATIONS

- BPXA PMT Project Flow Deliverables & Schedule Template presented to Cat C Manager
- Development of Select stage standard SBP process
  - Standardize Select stage project drivers
  - Apply lessons learned to aid with standardization of Select stage business drivers

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PM686A & PM686B FINAL PRESENTATION

12/2/2014

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- Project Manager recommends BPXA PMT Project Flow Deliverables & Schedule Template be presented to Cat C Manager after PM686B class course concludes.
- Project Manager also recommends development of Select stage standard SBP process. Standardization of Select stage project drivers should be the goal. Apply lessons learned from project analysis and data collection to aid with standardization of Select stage business drivers.

## LESSONS LEARNED

### Constructive

- Start IRB process sooner (PM686A)
- Project Manager did not account for North Slope trips which impacted IRB deliverable date (PM686A)
- Acquire BP Exploration Alaska Legal Counsel approval earlier in project (PM686A)
- Project Manager did not account for increased business responsibilities - Project Manager was not able to meet PPM #1, #2, and #3 submittal dates (PM686B)



## KEY OBSERVATIONS

### Positive

- Microsoft Project and WBS Chart Pro have advanced to allow automatic sync
- Critical to provide scope statement to committee advisory team members to review/comment to allow project manager to clearly define scope of work boundaries
- Communications plan determined early with project committee members allowed for prompt feedback
- Proper scheduling of tasks and subtasks allows for project execution efficiencies
- Adhering to change management plan restricted scope creep and allowed Project Manager to progress late submittals of PPM#1, PPM#2, and PPM#3 with approval from Advisor

CARLOS LUJAN, MSPM STUDENT  
PM686A & PM686B FINAL PRESENTATION

12/2/2014

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- Key observations through execution of PM 686A - Initiating and Planning and PM686B – Executing, Controlling, Closing

Questions/Comments?

CARLOS LUJAN, MSPM STUDENT  
PM655A & PM656B FINAL PRESENTATION

12/2/2014

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# **Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**

**Carlos Lujan, MSPM Student**

**Project Management Department, University of Alaska Anchorage**

## **Summary Narrative of Project Lessons Learned**

### **Introduction**

This document contains the constructive lessons learned and positive key observations. Both lessons learned and key observations account for project lessons learned. Each lessons learned and key observation will be listed followed with a short description.

### **Constructive Lessons Learned**

- Project Manager start IRB research and submittal process sooner – Time allotted in project schedule to prepare IRB submittal, advisor review, and final documents submittal had taken longer time than Project Manager had anticipated. Project Manager discussed IRB submittal process with two other MSPM student colleagues to understand initial UAA administration IRB approval issues. Fortunately UAA administration IRB approval issues were discussed and a plan was implemented by the time Project Manager submitted IRB final deliverables.
- Project Manager did not account for all business related North Slope trips through execution of PM 686A course– Project Manager was not able to adjust schedule tasks to accommodate final IRB submittal date. Project Manager North Slope trip negatively impacted project schedule final IRB deliverable date by two days. If Project Manager had started initial IRB training a week sooner, final IRB submittal date would have been met.

North Slope business trips were accounted for through execution of PM686B schedule. A larger task duration contingency was incorporated into project execution schedule.

- Project Manager did not account for the increased business responsibilities through execution of PM686B course- Project Manager was not able to meet PPM #1, #2, and #3 submittal dates as listed in PM 686B syllabus. Project Manager implemented the change management plan and updated the project risk register to acquire approval from project Advisor to continue with PM686B course.
- BPXA Legal approval must be given for any external paper or document to ensure confidential and proprietary information is not released. Project Manager planned to obtain BPXA Legal Counsel approval earlier in project schedule – Project Manager assumed project scope of work deliverables would not contain proprietary information to BPXA and Legal Counsel approval would be acquired in a timely manner. Project advisor recommended Project Manager acquire legal counsel approval after Project Charter, Research Sources and Key Words, and Description of Expected Research Methods, Results, and Approach to Analysis documents were completed and submitted.

Project Manager assumed legal counsel approval would be acquired quickly. Project legal counsel initial approval had taken several weeks to obtain. Project Manager had to submit all PM 686A PPM deliverables to BPXA PMT Team Lead (TL) and PMT Engineering Manager for review and approval. Project Manager had to attain permission to submit PM 686A deliverables to BPXA Legal Department. Once PM 686A deliverables were submitted to BPXA Legal Department, an appointed Legal Advisor had to be identified by BPXA Legal Department Head.

Legal Advisor review meeting was at discretion of appointed Legal Advisor. Fortunately PM 686A PPM deliverables were approved and Project Manager allowed to progress forward with project. Time to attain initial BPXA Legal approval exceeded Project Manager's task duration identified in project schedule.

BPXA Legal Counsel final project deliverables approval was required prior to Project Manager making the submittal to UAA administration department. Project Manager identified BPXA Legal Counsel approval tasks and incorporated into PM686B project execution schedule.

### **Positive Key Observations**

- Microsoft Project and WBS Chart Pro have advanced to allow automatic sync – Advances in task application and modification of both programs made updates more efficient than Project Manager had anticipated. Project Manager was able to focus on other PPM project deliverables which resulted in higher quality deliverables.
- Critical to provide scope statement early to committee advisory team members to review/comment to allow Project Manager to clearly define scope of work boundaries – Project Manager was able to submit initial project scope statement early in PPM deliverables process to allow thorough review by project committee members. As a result, project committee members were able to submit comments and Project Manager was able to follow up with scope statement discussion meetings which enabled all parties to agree with project scope statement and project deliverables. Project boundaries and constraints also further defined through project team member collaboration process.
- Communications plan determined early with project committee members allowed for prompt feedback – Project Manager and committee members established communications plan early to define formal and informal communication techniques. Project committee members required different PPM document distribution strategies. One committee member preferred the UAA collaboration area web site and the other committee member required E-mail distribution. Project Manager accommodated both requests and incorporated PPM document distribution strategies into project management plan.

PPM document distribution strategies allowed Project Manager to distribute PPM deliverables efficiently. PPM document distribution strategy also allowed project committee members access to PPM deliverables in timely manner which enabled more time to review and comment.

- Proper scheduling of tasks and subtasks allowed for project execution efficiencies – The defined project schedule established early enabled the Project Manager to complete tasks in a timely manner. The defined project schedule also listed advisory committee member subtasks. The Project Manager was able to verify and inform advisory committee members of their responsibilities and send requests via formal and informal communication techniques as established in project management plan.

The project schedule was utilized as a planning tool to define project deliverables and completion dates as required to satisfy PM 686A and PM 686B syllabi deliverables. The project schedule enabled the Project Manager to work the project management plan.

- Adhering to change management plan restricted scope creep - The project advisor and a committee member both recommended implementation of prioritization tool as part of final project deliverables. Project Manager had discussions with project sponsor on implementation of prioritization tool when project charter was under development. Project sponsor suggested not implementing tool as approval to change current BPXA prioritization process would require BPXA administrative and perhaps BPXA legal approval which would require more time than what is specified in UAA Master of Science in Project Management (MSPM) PM686A and PM686B curriculum. Project Charter states implementation of Cat C business objectives evaluation tool is out of project scope.

The project change management plan as specified in the project management plan requires project sponsor approval prior to making any scope changes as specified in project charter. Advisor committee request to implement project prioritization tool as part of final project deliverables was respectfully denied. Project Manager adhered to change management plan which enabled decision not to take on additional scope request by advisory committee members.

- BPXA SME support – The Project Manager had identified BPXA subject matter experts to receive project survey and serve as interviewees. Project Manager had distributed project consent forms to and received signed copies from SMEs. Project Manager acquired SME support to start interview process as specified in PM 686A and PM686B course deliverable “Description of Expected Research Methods, Results, and Approach to Analysis.”





# **Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**

**Carlos Lujan, MSPM Student  
Project Management Department, University of Alaska Anchorage**

## **Descriptive Narrative of Selected Knowledge Areas**

### **Introduction**

This document lists the three focused knowledge areas. This document also describes how the three focused areas were applied and measured through execution of PM 686B Executing, Controlling, and Closing course. Application and performance details listed in PPM deliverables #1, #2, #3, and #4. Final project deliverables updates listed in Project Time Management knowledge area.

### **Knowledge Area – Project Communications Management**

#### **Application**

- Identify all stakeholders.
- Execute communications management plan that ensures that stakeholders are informed through project execution.
- Distribute information in timely manner to allow feedback.
- Update and distribute stakeholder requirements documentation and distribute as required.

#### **Performance Measurement**

- Added stakeholders to be documented in project management plan and updated through project execution.
- Adherence to project communication plan.
- Document stakeholder feedback and submit deliverable prior to due dates.
- Document validation requirements as described in change management plan and distribute to appropriate stakeholder committee members.
- Inform committee advisory members on changes as they occur.

#### **PPM #1 Application and Performance Measurement**

- PM 686B PPM#1 and PPM#2 deliverables meeting requested 10/9/14. Meeting conducted at project Advisor office 10/10/14. Clear directive for Project Manager to attain approval to precede with project development deliverables through PM 686B presented.
- Change request form submitted to Advisor and Committee members via email.
- Change management log updated with change request to extend PPM#1, PPM#2, and PPM#3 deliverables to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.
- Updated Student/Advisory Committee Expectations Contract re-distributed to attain fall semester 2014 signatures.
- Project schedule distributed to advisor and committee members to illustrate project deliverables are attainable with-in project constraint end date of December 8<sup>th</sup>, 2014.

#### **PPM #2 Application and Performance Measurement**

- PM 686B PPM#1 submitted to UAA website and distributed via email to advisory committee members.
- Change management log updated with change request to extend PPM#1, PPM#2, and PPM#3 deliverables to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.

- Change request form and change log approved by advisor and submitted to Project Manager via email.
- PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.
- Meeting with Walter Almon to discuss:
  - PPM #1, PPM#2, and PPM#3 submittal dates
  - Committee Advisory paper review dates
  - Change Request Form and Change Log
  - PM 686B Student/Advisory Commitment Contract

#### **PPM #3 Application and Performance Measurement**

- PM 686B PPM#2 and 3 submitted to UAA website and distributed via email to advisory committee members.
- Change management log updated with change request to extend PPM#3 deliverable to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.
- Change request form and change log approved by advisor and submitted to Project Manager via email.
- PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.
- Meeting with SME Ray Schulte to review project paper.

#### **PPM #4 Application and Performance Measurement**

- PM 686B PPM#4 submitted to UAA website and distributed via email to advisory committee members.
- Change request form and change log approved by advisor and submitted to Project Manager via email.
- PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.
- Meeting with SME Ray Schulte to review project paper for potential BP proprietary information.
- BP Legal Counsel requested BP Operations review of Project Paper and approve prior to his review and comment. As a result, meeting requested by Project Manager with Walter Almon, Mike Spitz, and Ray Schulte. Meeting conducted to obtain comments and gain approval. Project paper updated and submitted to BP Legal.
- BP Legal Counsel reviewed and commented. Project Manager updated paper based on instruction. Project paper approved by BP Legal Counsel.

### **Knowledge Area – Project Time Management**

#### **Application**

- Define and sequence activities that are realistic.
- Estimate activity resources with durations taking into consideration stakeholder's limited time availability.

#### **Performance Measurement**

- Document task additions and sequence changes to Gantt chart through execution.
- Document number of times to re-baseline Gantt chart (if required).
- Utilize Microsoft Project to define project deliverables and tasks physical percentages complete.
- Update Gantt chart through execution and inform project stakeholders of project WBS task progression.

#### **PPM #1 Application and Performance Measurement**

- Gantt chart updated to incorporate PM 686B project deliverables. Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and project paper at 60% complete which is accurate with 10/18/14 project status date.



#### **PPM #2 Application and Performance Measurement**

- Gantt chart updated to incorporate PM 686B project deliverables.
- Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and at 86% complete which is accurate with 10/28/14 project status date.
- WBS update illustrates percentage complete for Integration 86%, Communication 90%, Scope 89%, Risk 90%, and Time Management 80%.

#### **PPM #3 Application and Performance Measurement**

- Gantt chart updated to incorporate PM 686B project deliverables.
- Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and at 95% complete which is accurate with 11/16/14 project status date.
- WBS update illustrates percentage complete for Integration 96%, Communication 97%, Scope 99%, Risk 95%, and Time Management 95%.

#### **PPM #4 Application and Performance Measurement**

- Gantt chart updated to incorporate BP Legal Counsel added tasks. Operations review/approval and project paper updates to obtain BP Legal Counsel approval.
- Gantt chart and WBS updates show PM 686A & B deliverables and at 97% complete which is accurate with 11/20/14 project status date.
- WBS update illustrates percentage complete - Integration 99%, Comm. 97%, Scope 99%, Risk 95%, Time Management 95%, PMP 99%, and Oral Presentation 77%.

#### **Final Project Deliverables Application and Performance Measurement**

- Gantt chart revisited 2 times (11/30/14, 12/2/14) to provide timely updates with accurate task completion percentages.
- Gantt chart and WBS updates show PM686A and PM686B class deliverables at 100% complete which corresponds with final project deliverables and shows project is complete on schedule.

### **Knowledge Area – Project Integration Management**

#### **Application**

- Integrate project charter
- Implement project management plan.
- Implement change management plan.

#### **Performance Measurement**

- Execute project according to project management plan.
- Document scope of work change requests.
- Integrate approved scope of work changes.
- Document the complete impact of change requests.
- Distribute change management plan deliverables to stakeholders.

#### **PPM #1 Application and Performance Measurement**

- Project charter and project management plan updated with PM 686B course PPM and project deliverables.
- Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001.
- Change management log updated with Change request PM686B-001.

#### **PPM #2 Application and Performance Measurement**

- Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001.
- Change management log updated with Change request PM686B-001.
- Requirements traceability matrix, risk register and risk response implementation updated.

**PPM #3 Application and Performance Measurement**

- Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001 and PM686B-002.
- Change management log updated with Change request PM686B-001 and PM686B-002.
- Requirements traceability matrix, risk register and risk response implementation updated.

**PPM #4 Application and Performance Measurement**

- Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001 and PM686B-002.
- Change management log updated with Change request PM686B-001 and PM686B-002.
- Requirements traceability matrix, risk register and risk response implementation updated.





BP EXPLORATION (ALASKA) INC.

# Project Management Plan

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Development of a Prioritization Tool for BP  
Exploration (Alaska) Inc. Category C Projects

**Prepared by: Carlos Lujan**

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**Revision History**

<b>Revision No.</b>	<b>By</b>	<b>Date</b>
0	Carlos Lujan	12/4/14

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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## **1. Project Scope Statement**

### **1.1. Project Description**

The production of oil and gas in the major North Slope fields in Alaska is on the decline as it is in any major oilfield of this age. Capital resources must therefore be utilized with the greatest efficiency.

BP Exploration (Alaska) Inc. (BPXA) Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category (Cat) "C" projects (range from \$250,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process.

One of BP Exploration Alaska's strategic objectives is to improve the utilization of Cat C projects capital resources.

### **1.2. Project Purpose**

The project will develop and clarify business objectives ensuring only Cat C projects with strong business drivers will be funded, unless the project is an integrity or health and safety project. This approach will ensure that fit-for-service improvements are selected for execution.

### **1.3. Project Objectives**

The project provides a step-by-step BPXA Category (Cat) C project assessment tool to define business objectives, quantifies the business drivers, and provides a tool to use for the subsequent prioritization. The project was developed using an analysis of existing Cat A and B business objectives and prioritization literature provided background information on current strategies. In addition, analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were identified to be examined. This project includes research, development of business objectives criteria definition, design of analytical hierarchical process matrix, and documentation to logically apply a step-by-step tool to identify and quantify business objectives to assist with BPXA Cat C project prioritization.

### **1.4. Project Assumptions**

- Project Manager has access to necessary software programs (Microsoft Office, WBS Chart Pro, Blackboard, Backbone).
- Advisors will review and give constructive feedback on draft project deliverables in a timely manner.
- This project assumes the SMEs are receptive and willing to participate in the interview process.
- Project Stakeholders have adequate time to review and approve project deliverables.
- The project assumes no risk of proprietary BP information.

### **1.5. Project Constraints**

- Project Progress Milestone (PPM) dates as specified in 686A and 686B syllabi
- Advisor and committee members time availability

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## 2. Project Risks

- Committee Advisor time availability
- Subject Matter Expert (SME) participation
- Adequate survey questions
- Critical Resources
- Acquire Project Management Software
- BP Exploration Alaska Legal Support
- Project Manager time availability to develop, review, modify, and submit project deliverables
- Project Manager submittal of Quality Paper in PM 686B PPM#3

### 2.1. Risk Register

PROJECT RISKS												
RISK ASSESSMENT AND MITIGATION MATRIX												
Risk Description	Probability	Impact	Ability to Manage	Mitigation Plan	Residual Probability	Residual Impact	Ability to Manage	Trigger/ Response Plan	Risk Owner	Status of Risk	Completion Date	
Committee Advisor time availability	M	H	L	Inform Committee Advisor of PMP deliverables expected review dates via class announcement, e-mail, phone, UAA collaboration area web site, and UAA PPM & deliverables web site.	L	L	H	Committee advisor not responding to project manager with PPM comments/ recommendations.	Project Manager	Addressed	11/18/2014	
SME participation	H	H	L	Coordinate with GPO and GOO general managers to acquire support	L	L	H	SME do not reply with signed consent form.	Project Manager	Addressed	09/23/2014	
Adequate survey questions	M	H	H	Generate questions with qualified SME and review with committee advisors	L	L	H	SME response not sufficient to complete project deliverables as specified in Appendix 11.9.	Project Manager	Addressed	09/09/2014	

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Critical Resources review / recommendations	M	H	L	Review project schedule with committee team to acquire approval and generate Student / Advisory Committee Contract	L	L	H	Committee team not responding to project manager with PPM comments / recommendations.	Project Manager	Addressed	12/01/2014
Acquire Project Management Software	L	H	M	Download demo versions from websites and UAA Faculty Staff	L	L	H	Website demo versions not adequate for project WBS and schedule.	Project Manager	Addressed	01/23/2014
BP Exploration Alaska Legal Counsel support	M	H	L	Verify project deliverables are not proprietary to BP Exploration Alaska. Set up meeting to discuss project deliverables prior to PM686A class completion and at PM686B project conclusion.	L	L	H	Schedule meeting with BP Exploration Legal Counsel prior to completion of both PM686A and PM686B classes.	Project Manager	Addressed	11/19/2014
Project Manager time availability to develop, review, modify, and submit project deliverables	H	H	M	Re-baseline project execution schedule which enables Project SOW completion with deliverable dates as specified in PM686B syllabus.	M	H	H	Project Manager behind on PPM submittals	Project Manager	Addressed	10/23/2014
Project Manager submittal of Quality Paper in PM 686B PPM#3	M	M	H	Submit preliminary working draft to advisory committee for review.	L	L	H	Add committee advisory review task to schedule and inform via collaboration area and email.	Project Manager	Addressed	11/21/2014

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The risk scale is a 3X3 probability grid: Low, Medium, High. Low and Medium probability risks are managed directly by the project manager and the project sponsor is an informed party. High probability risks are managed jointly by the project manager and the project sponsor with direct oversight by the PMT program manager with the project manager providing input and doing the execution steps for mitigation.

	Low	Medium	High
High			
Medium			
Low			

Refer to Appendix T. Risk Response Implementation for further detail.

### 3. Project Deliverables and Milestones

The following information provides a summary-level description of the project:

**PM 686A Initiating and Planning (January 17, 2014 thru April 28, 2014)**

**Dates**

1/17/14:	Project Start
2/6/14:	Project Abstract Preliminary Project Schedule
2/21/14:	Project Charter Preliminary Research Methods and Approach
3/14/14:	Project Management Plan draft Description of Expected Research Methods, Results, and Approach for Analysis
3/28/14:	UAA IRB Submittal
4/11/14:	Advisor-Approved Research Instruments and Analysis Methodology Professional draft Presentation of Project Final Project Management Plan 1st Go/No-Go Decision
4/21/14:	Final Presentation
4/28/14:	Final Project Management Plan Refined Project Research, Deliverables, Outcomes Final Presentation Slides



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Lessons Learned Narrative  
Knowledge Areas Narrative

**PM 686B Executing, Controlling, and Closing (September 05, 2014 thru December 08, 2014)**

Dates:

10/21/14:	Change Control Process Project Progress Method and Status Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Data Collection/Research Update Update on 3-4 Knowledge Areas Final GSP Updates Student / Advisory Committee Expectations
10/28/14:	Updated Abstract Updated Table of Contents Updated Research Sources and Key Words Validated Research Analysis Project Progress Status Update on 3-4 Knowledge Areas Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Signed Student/Advisory Committee Contract
11/11/14:	Draft Paper Revised Abstract Research Results and Analysis Preliminary Conclusions and Project Deliverables Update on 3-4 Knowledge Areas 2nd Go/No-Go Decision (Checkpoint 11/12/14)
11/21/14	Draft Presentation Final Project Report Final Project Deliverables Updated Project Schedule Update on 3-4 Knowledge Areas Final Go/No-Go Decision (Checkpoint 11/26/14)
12/1/14	Final Oral Presentation:
12/8/14	Final Report

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Lessons Learned Narrative Knowledge Areas Narrative
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**Table 3.0 Major Milestones**

### **3.1. Project Schedule**

Project schedule updated to include PM 686B deliverables in September 2014.

Refer to Appendix R. Updated Project Schedule for details of tasks and subtasks.

## **4. Work Breakdown Structure**

High level project work breakdown structure

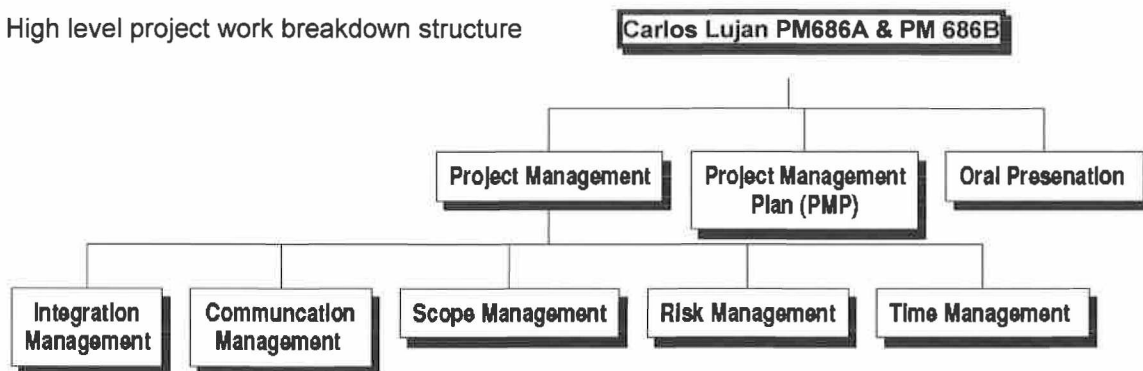


Figure 4.0 High Level Project WBS

### **4.1. Detailed Work Breakdown Structure**

Refer to Appendix S. Updated Work Breakdown Structure for details.

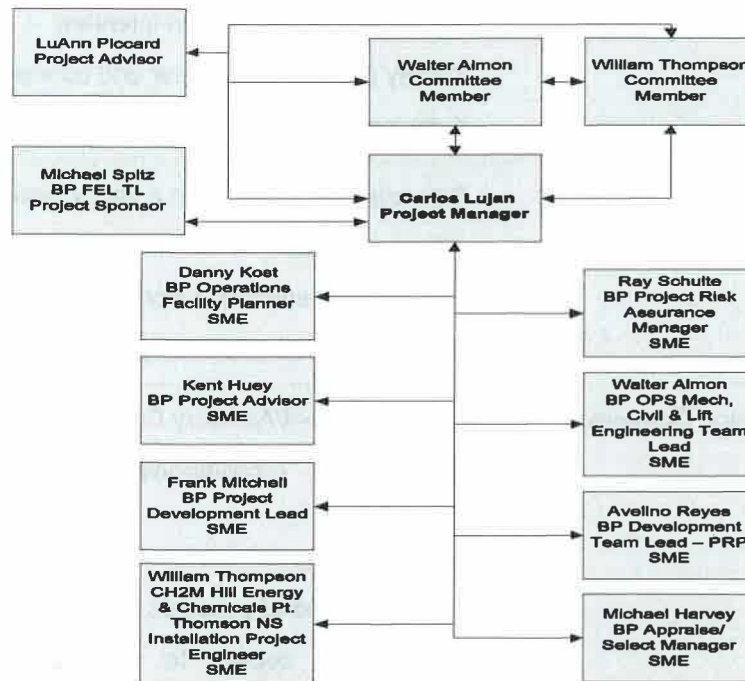
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## Project Management Plan

### Carlos Lujan, MSPM Student

## 5. Human Resource Management Plan

### 5.1. Organizational Breakdown Structure



**Figure 5.1 Project Organization Chart**

The information provides an organizational breakdown structure which illustrates the immediate project stakeholders and the information transfer process between stakeholders.

### 5.2. Stakeholder Identification and Analysis

Stakeholders :	Relationships:	Needs:
<b>PMT Management</b>	Program Managers	BP Exploration Alaska policies and procedures adhered to.
<b>BP Exploration Alaska Legal Counsel</b>	Legal Advisor	Preserve relationship. Keep informed of progress. Keep informed of changes.
<b>PMT Team Lead (TL)</b>	PMT (Sponsor) Supervisor	Preserve relationship. Keep informed of progress. Keep informed of changes.
<b>PMT Project Leads</b>	Co-Workers	BP policies and procedures adhered to.

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<b>(PLs)</b>		Preserve relationships. BP policies and procedures are adhered to.
<b>Subject Matter Experts (SMEs)</b>	Survey Respondents	Agreement to take part in interview. Survey questions are clear and concise. Sufficient time is given to complete survey.
<b>UAA Professors</b> Lu Ann Piccard Seong Dae Kim Roger Hull	Professor	Deliverables turned in on a timely basis. Attend classes. Presentation submitted April 21 <sup>st</sup> , 2014. Submit final deliverables April 28 <sup>th</sup> , 2014.
<b>UAA Advisors</b> LuAnn Piccard Walter Almon William Thompson	Advising Committee	Signed Student/Advisory Committee "Contract" Contact via email/phone to set-up advisory meetings. Meet with regularly (at least once a month). Keep informed of progress. Bring hard copies to meeting for editorial purposes.
<b>Student Advisors</b>	Peers	Contact via email/phone to set-up advisory meetings. Meet with regularly (at least once a month). Keep informed of progress. Bring hard copies to meeting for editorial purposes.
<b>PM Department &amp; Graduate School</b>	Administrators	Keep informed of progress. Keep informed of changes. Submit required paperwork on-time.

**Table 5.2.1 Stakeholder Matrix**

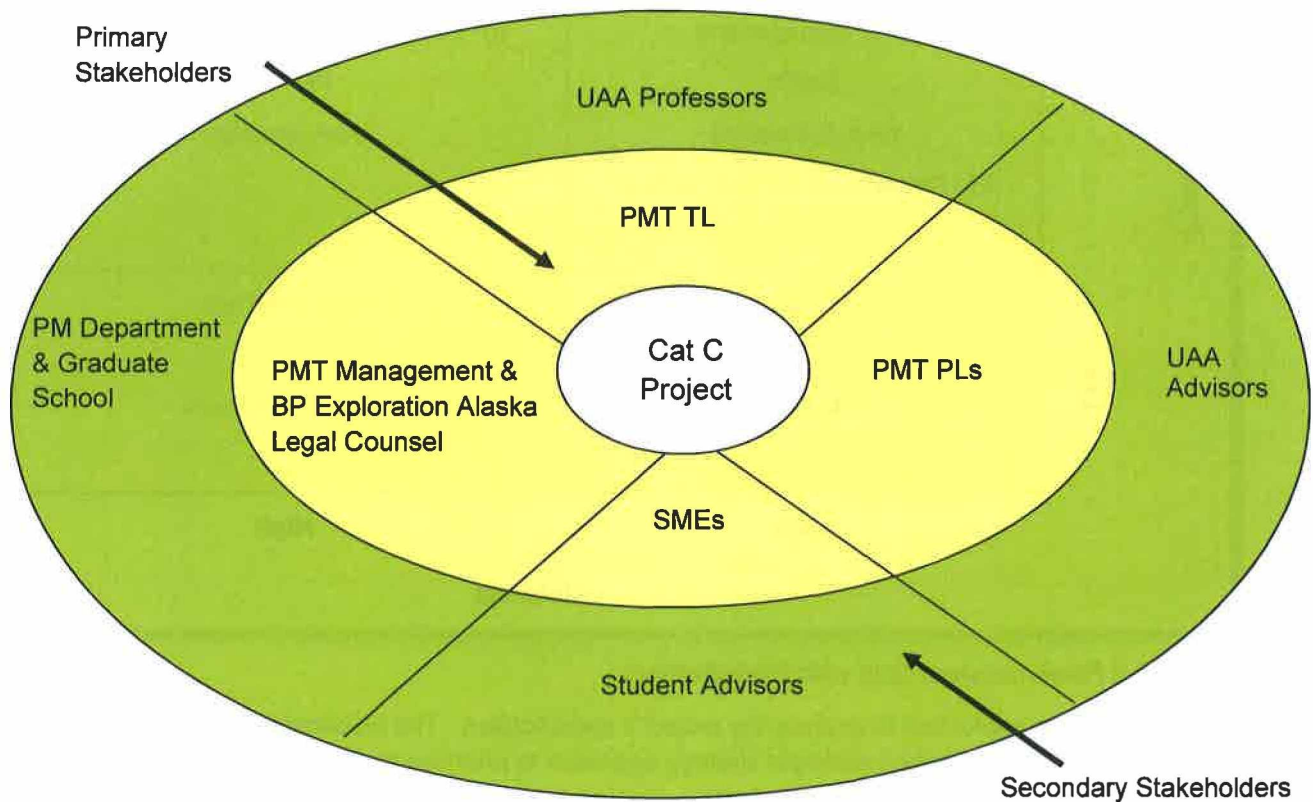
The matrix lists some of the key stakeholders in this project. Stakeholders range from Oil and Gas to University of Alaska Anchorage (UAA) personnel. Depending upon their relationship, their needs differ. For example my UAA advisors and committee members need to be met with regularly and kept informed of progress. On the other hand I have BP stakeholders (Program Managers, a Sponsor, and Co-Workers) who are required to adhere to policies/procedures and concerned with preserving relationships.



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It is important for the requirements to be included in the project management plan. In order for the project to reach the optimum level of success then the project manager must fulfill the maximum number of stakeholder requirements.



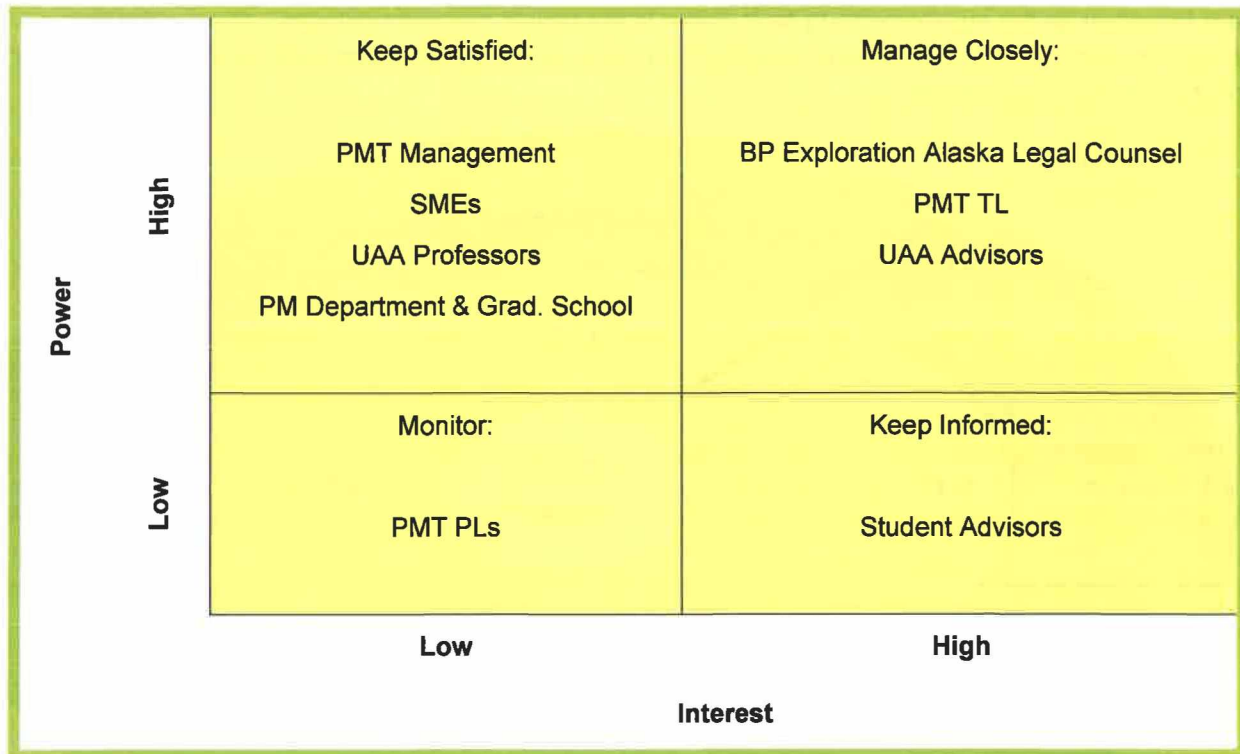
**Figure 5.2.2 Stakeholder Diagram**

The above diagram divides the project stakeholders into two categories: primary and secondary.

Primary stakeholders are individuals or groups of people who directly benefit from or are affected by a particular business activity, such as the distribution of a product or a change to a service agreement. Primary stakeholders in this study include PMT Management, BP Exploration Alaska Legal Counsel, PMT Team Lead, PMT Project Leads, and Subject Matter Experts.

Secondary stakeholders are people or groups who have a role in the decision-making process without being directly affected by the outcome. Secondary stakeholders in this study include UAA Professors, UAA Advisors, Student Advisors, and PM Department & Graduate School.

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**Figure 5.2.3 Power/Interest Grid with Stakeholders**

The power grid is a useful tool to analyze the project's stakeholders. The placement of different stakeholders determines project manager strategy approach to prioritize their requirements and expectations.

1. PMT TL and UAA Advisors must be managed closely by the project manager in order to ensure that the stakeholders are in agreement and share the same project plan.
2. PMT Management, SMEs, UAA Professors, and PMT Department & Graduate School stakeholders have little interest in the project's outcome but have the distinct ability to affect the project need to be kept satisfied.
3. Student Advisor stakeholders have moderate interest in the project and limited power to change final project deliverables thus keeping informed is adequate.
4. PMT PL stakeholders require the least amount of effort from the project team as they require periodic monitoring to ensure interest and or power does not increase through the project execution.

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## **6. Communications Management Plan**

### **6.1. Stakeholder Contact**

<b>Name</b>	<b>Position</b>	<b>Phone</b>	<b>Email</b>
Michael Spitz	Project Sponsor	564-4926	<a href="mailto:michael.spitz@bp.com">michael.spitz@bp.com</a>
Randal Buckendorf	BP Legal Counsel	564-5289	<a href="mailto:Randal.buckendorf@bp.com">Randal.buckendorf@bp.com</a>
Carlos Lujan	Project Manager	564-5274	<a href="mailto:carlos.lujan@bp.com">carlos.lujan@bp.com</a>
LuAnn Piccard	Project Advisor	786-1917	<a href="mailto:lpiccard@uaa.alaska.edu">lpiccard@uaa.alaska.edu</a>
Walter Almon	Project Committee Member SME	564-5371	<a href="mailto:walter.almon@bp.com">walter.almon@bp.com</a>
William Thompson	Project Committee Member SME	382-2415	<a href="mailto:william.thompson@ch2m.com">william.thompson@ch2m.com</a>
Danny Kost	SME	564-4787	<a href="mailto:danny.kost@bp.com">danny.kost@bp.com</a>
Kent Huey	SME	564-4508	<a href="mailto:kent.huey@bp.com">kent.huey@bp.com</a>
Frank Mitchell	SME	564-4945	<a href="mailto:frank.mitchell@bp.com">frank.mitchell@bp.com</a>
Michael Harvey	SME	564-4737	<a href="mailto:michael.harvey@bp.com">michael.harvey@bp.com</a>
Ray Schulte	SME	564-4806	<a href="mailto:schurt@bp.com">schurt@bp.com</a>
Avelino Reyes	SME	375-7031	<a href="mailto:avelino.reyes@bp.com">avelino.reyes@bp.com</a>

### **6.2. Formal Communications**

#### **Meetings**

- Class sessions as specified in PM 686A and 686B syllabi
- PPM #1, #2, #3, #4 reviews with committee members
- Draft Project Management Plan review

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- The Project Management Plan will be reviewed and modified as necessary to achieve team buy-in by advisory committee.
- Interviews with SME's
- BP Exploration Alaska Legal Counsel reviews

### **6.3. Informal Communications**

Informal communications:

- E-mail
- Phone
- UAA collaboration area web site
- UAA PPM and deliverables submission web site

## **7. Project Monitor and Control Plan**

### **7.1. Status Reports**

- Project Status Report Dashboard
- Application and Performance of 3 Knowledge Areas to PPM Deliverables
- Schedule update submittals
- WBS update submittals
- Requirements Traceability Matrix
- Change request status (if required)

### **7.2. Status Report Cycle**

Status reports listed above shall be submitted as required in PM 686A and 686B syllabi.

Refer to Appendix K. Status Reports for project submittals

### **7.3. Requirements Traceability Matrix**

Refer to Appendix L. Project Requirements (Traceability Matrix) Documentation for project execution details.

### **7.4. Method for Measuring Project Progress**

- Project Status Report Dashboard
- Schedule update submittals
- WBS update submittals
- Requirements Traceability Matrix

### **7.5. Subsidiary Plans for 3 Knowledge Areas**

Refer to Appendix M. Application & Performance of 3 Knowledge Areas (PM 686A PPM Deliverables) for application details.

Refer to Appendix N. Application & Performance of 3 Knowledge Areas (PM 686B PPM Deliverables) for application details.

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## **8. Change Management Plan**

### **8.1. Purpose of Change Management**

The Change Management Plan documents and tracks the necessary information required to effectively manage project change from project inception to delivery.

The Change Management Plan is created during the Planning Phase of the project. Its intended audience is the project manager, project advisor, project committee members, and project sponsor.

### **8.2. Change Management Process**

The Change Management process establishes an orderly and effective procedure for tracking the submission, coordination, review, evaluation, categorization, and approval for release of all changes to the project's baselines. Refer to Appendix T. Change Request Form and Change Log for Change Management Plan execution.

#### **8.2.1. Change Request Process Flow Requirements**

Step	Description
Generate CR	A submitter completes a CR Form and sends the completed form to the Project Manager
Log CR Status	The Project Manager enters the CR into the CR Log. The CR's status is updated throughout the CR process as needed
Evaluate CR	Project personnel review the CR and provide an estimated level of effort to process, and develop a proposed solution for the suggested change
Authorize	Approval to move forward with incorporating the suggested change into the project
Implement	If approved, make the necessary adjustments to carry out the requested change and communicate CR status to the submitter and other stakeholders



#### **8.2.2. Change Request Form and Change Management Log**

Element	Description
Date	The date the CR was created
CR#	Assigned by the Project Manager
Title	A brief description of the change request
Description	Description of the desired change, the impact, or benefits of a change should also be described
Submitter	Name of the person completing the CR Form and who can answer questions regarding the suggested change
Phone	Phone number of the submitter (see stakeholder contacts)



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E-Mail	Email of the submitter (see stakeholder contacts)
Priority	A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low)

Change Log							
Project:						Date:	
Change No.	Change Type	Description of Change	Requestor	Date Submitted	Date Approved	Status	Comments
Each change request is assigned a reference number	This may be a design, scope, schedule or other type of change	The change request should be described in detail	Who initiated the change request	When was the request submitted	When was the request approved	Is the change request open, closed or pending? Has it been approved, denied or deferred	This section may describe why the change request was rejected, deferred or provide any other useful information

### 8.2.3. Evaluating and Authorizing Change Request

Change requests are evaluated using the following priority criteria:

Priority	Description
High	Insert the definition the project assigns to a high priority CR
Medium	Insert the definition the project assigns to a medium priority CR
Low	Insert the definition the project assigns to a low priority CR

Change requests are evaluated and assigned one or more of the following change types:

Type	Description
Scope	Change affecting scope
Time	Change affecting time
Duration	Change affecting duration
Resources	Change affecting resources
Deliverables	Change affecting deliverables
Product	Change affecting product
Processes	Change affecting process
Quality	Change affecting quality

Change requests are evaluated and assigned one of the following status types:

Status	Description
Open	Entered/Open but not yet approved or assigned
Work in Progress	CR approved, assigned, and work is progressing
In Review	CR work is completed and in final review prior to testing
Testing	CR work has been reviewed and is being tested
Closed	CR work is complete, has passed all tests, and updates have been released.

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**8.2.4. Change Control Board**

<b>CHANGE CONTROL BOARD - DECISION</b>				
<b>Decision</b>	<input type="checkbox"/> Approved	<input type="checkbox"/> Approved w/Conditions	<input type="checkbox"/> Rejected	<input type="checkbox"/> More Info
<b>Decision Date</b>				
<b>Decision Explanation</b>				
<b>Stakeholder</b>	Signature		Date	
<b>Project Sponsor</b>				
<b>Project Advisor</b>				
<b>Committee Member</b>				
<b>Committee Member</b>				
<b>Project Manager</b>				

Refer to Appendix U. Change Request Forms and Change Management Log for application through execution of project.

**9. Project Close-Out**

The project will provide a step-by-step tool to define business objectives, quantify the business drivers and provide a tool to use for the subsequent prioritization for BP Cat C projects.

The tool developed will complete project deliverable for PM 686A and PM 686B course requirements.

The tool will be shared with BP Cat C Manager after the tool is developed for the PM 686A and PM 686B course deliverable. Tool application to BP's category C projects will commence after BP Cat C Manager agrees with approach to define business objectives, quantify business drivers, and provide assistance with prioritization.

**10. Lessons Learned**

Lessons learned is the learning gained from the process of performing a project. Formally conducted lessons learned sessions are traditionally held during project close-out, near the completion of the project. However, lessons learned may be identified and documented at any point during the project's life cycle. The purpose of documenting lessons learned is to share and use knowledge derived from experience to:

- Promote the recurrence of desirable outcomes
- Preclude the recurrence of undesirable outcomes

As a practice, lessons learned includes the processes necessary for identification, documentation, validation, and dissemination of lessons learned. Utilization and incorporation of those processes includes identification of applicable lessons learned, documentation of lessons learned, archiving lessons learned, distribution to appropriate personnel, identification of actions that will be taken as a result of the lesson learned, and follow-up to ensure that appropriate actions were taken.

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Lessons learned should draw on both positive experiences– good ideas that improve project efficiency, and negative experiences– lessons learned only after an undesirable outcome has already occurred. Every documented lesson learned should contain at least these general elements:

- Project information and contact information for additional detail
- A clear statement of the lesson
- A background summary of how the lesson was learned
- Benefits of using the lesson and suggestion how the lesson may be used in the future

Lessons learned will be documented throughout development of PM 686A and PM 686B courses. A separate 2-3 page summary narrative of project lessons learned will be submitted for each course upon completion.

Refer to project binder tab #3 for project lessons learned through execution of PM 686A and PM686B courses.



## **11. Appendices**

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**A. Abstract**

The production of oil and gas in the major North Slope fields in Alaska is on the decline as it is in any major oilfield of this age. Capital resources must therefore be utilized with the greatest efficiency.

BP Exploration (Alaska) Inc. (BPXA) Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category (Cat) "C" projects (range from \$250,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process.

One of BPXA's strategic objectives is to improve the utilization of Cat C projects capital resources. The project will develop and clarify business objectives ensuring only Cat C projects with strong business drivers will be funded, unless the project is an integrity or health and safety project. This approach will ensure that fit-for-service improvements are selected for execution.

The project provides a step-by-step BPXA Category (Cat) C project assessment tool to define business objectives, quantifies the business drivers, and provides a tool to use for the subsequent prioritization. The project was developed using an analysis of existing Cat A and B business objectives and prioritization literature provided background information on current strategies. In addition, analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were identified to be examined. This project includes research, development of business objectives criteria definition, design of analytical hierarchical process matrix, and documentation to logically apply a step-by-step tool to identify and quantify business objectives to assist with BPXA Cat C project prioritization.

**Key Words**

1. Stage Gated Project Development Process
2. Budget Boundaries
3. Business Categories
4. Defining Business Objectives
5. Business Objectives Criteria
6. Business Objectives Prioritization Process
7. Business Objectives Prioritization Matrix
8. Facility Optimization
9. Facility Future Plan
10. Field Future Plan
11. Reliability and Operability
12. Business Case Analysis
13. Setting Business Priorities

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**B. Project Charter**

PROJECT INFORMATION			
		<b>DATE PREPARED:</b>	2/2/2014
<b>PROJECT NAME:</b>	Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects		<b>DATE MODIFIED:</b>
			4/9/2014
<b>PROJECT SPONSOR:</b>	Michael Spitz	<b>PHONE:</b>	564-4926
<b>PROJECT MANAGER:</b>	Carlos Lujan	<b>PHONE:</b>	564-5274
<b>SCHEDULED START DATE:</b>	February 1, 2014	<b>SCHEDULED COMPLETION DATE:</b>	December 08, 2014
<b>ATTACHMENTS</b>		686A and 686B Syllabi	

PROJECT OVERVIEW
<p>The production of oil and gas in the major North Slope fields in Alaska is on the decline as it is in any major oilfield of this age. Capital resources must therefore be utilized with the greatest efficiency.</p> <p>BP Exploration (Alaska) Inc. (BPXA) Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category (Cat) "C" projects (range from \$250,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process.</p> <p>One of BPXA's strategic objectives is to improve the utilization of Cat C projects capital resources. The project will develop and clarify business objectives ensuring only Cat C projects with strong business drivers will be funded, unless the project is an integrity or health and safety project. This approach will ensure that fit-for-service improvements are selected for execution.</p>

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The project provides a step-by-step BPXA Category (Cat) C project assessment tool to define business objectives, quantifies the business drivers, and provides a tool to use for the subsequent prioritization. The project was developed using an analysis of existing Cat A and B business objectives and prioritization literature provided background information on current strategies. In addition, analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were identified to be examined. This project includes research, development of business objectives criteria definition, design of analytical hierarchical process matrix, and documentation to logically apply a step-by-step tool to identify and quantify business objectives to assist with BPXA Cat C project prioritization.

The project is phased to follow University of Alaska Anchorage (UAA) Master of Science in Project Management (MSPM) Capstone class durations as listed:

- PM 686A Initiating and Planning (January 17, 2014 thru April 28, 2014)
- PM 686B Executing, Controlling, and Closing (September 05, 2014 thru December 08, 2014)

Contents of each class are listed:

**PM 686A Initiating and Planning**

- Stakeholder Identification and Analysis
- Project Charter
- Preliminary project schedule/gantt chart with updates
- Preliminary Work Breakdown Structure (WBS) with updates
- 200 word Project Abstract with updates
- Letter(s) of support from project sponsor
- Preliminary Graduate Studies Plan (GSP) (including written agreement from advisor/committee members)
- Selection of 3-4 Knowledge Areas used during project to demonstrate mastery, how they will be applied to the project and how the performance will be measured. (with update)
- Project scope statement
- Requirements documentation (stakeholder requirements)
- Tables of contents for PM Plan and Final Project Report
- Research Sources and Key Words
- Preliminary research methods and approach to analysis (e.g., surveys, interview questions, statistical analysis, etc.)
- Description of expected research methods, results and approach for analysis
- Signed Student/Advisory Committee "contract"
- Written draft of project management plan with updates
- Description of expected project deliverables and outcomes (with updates)

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- Advisor- approved research instruments and analysis methodology. Approval must be documented in email.
- University of Alaska Anchorage (UAA) IRB submittal
- Professional draft presentation of project objectives, charter, project management plan description of project deliverables
- Presentation of approved Project Plan. PowerPoint/other media. (with updates)
- Oral Presentation
- Separate 2-3 page summary narrative of project lessons learned.
- Separate 2-3 page descriptive narrative of how focused knowledge areas were applied and measured on project.

PM 686B Executing, Controlling, Closing

- Change Control Process, Project progress method and status (e.g. EVM, other)
- Project Management Plan updates (using change control process)
- Updates on requirements traceability matrix
- Updates on WBS
- Updates on schedule/gantt chart
- Updates on risk register
- Risk response implementation
- Project deliverables status update
- Data collection/research updates (should have all raw data at this point)
- 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery (with updates)
- Final signed GSP directly to PM Department Staff
- Signed Student/Advisory Committee "contract"
- Updates on abstract
- Updates on table of contents
- Updates on research sources and key words
- Research results with validated research analysis (needs advisor approval)
- Preliminary conclusions and project deliverables
- Draft presentation
- Complete and properly formatted project report and final project deliverables (with updates)
- Oral Presentation
- Final report, to include two hard copies of complete report, appendices, mandatory deliverables and PowerPoint presentation. One copy will be placed in tabbed binder provided by the Department for MSPM library with a CD of complete copy of electronic files.
- 2-3 page summary narrative of project lessons learned included in separate section of project binder.
- Narrative on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery. Performance measured and lessons learned.

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<b>BP DIVISIONS/SYSTEMS IMPACTED</b>
Operations, Activity Planning, Backbone, Discipline Capability, Engineering Services, Logistics and Infrastructure, Reliability and Maintenance, Finance, Data Management

<b>PROJECT OBJECTIVES</b>	
<b>OBJECTIVE</b>	<b>CRITERIA FOR EVALUATION</b>
Define business objectives for Cat C projects to assist with project evaluation criteria.	Acceptance by PMT TL.
Enhance prioritization method for BP Cat C projects with results from business objectives evaluation to assign and execute projects without increased cost due to deferment.	Project deferment cost reductions.
Support BP PMT execution handbook	Meets requirements of BP global Cat A and B business objectives standards.

<b>PROJECT SCOPE</b>	
<b>IN SCOPE</b>	<b>OUT OF SCOPE</b>
Analyze BP Cat A and B business objectives criteria	Suggestions to enhance Cat A and B business objective evaluation methodology
Analyze current prioritization for BP Cat C projects	Analyze prioritization methods outside oil and gas industry
Define interview questions for SMEs	
Conduct interviews	Conduct interviews outside oil and gas industry
Compile and evaluate interview results	
Develop a standard methodology to identify business objectives for Cat C projects	
Design a business objectives criteria definition checklist and matrix	
Assemble manual which illustrates Cat C business objectives evaluation tool	Implementation of Cat C business objectives evaluation tool



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**MAJOR MILESTONES**

**PM 686A Initiating and Planning (January 17, 2014 thru April 28, 2014)**

Dates

- |          |  |
|----------|--|
| 1/17/14: | Project Start  |
| 2/6/14:  | Project Abstract<br>Preliminary Project Schedule   |
| 2/21/14: | Project Charter<br>Preliminary Research Methods and Approach   |
| 3/14/14: | Project Management Plan draft<br>Description of Expected Research Methods, Results, and Approach for Analysis  |
| 3/28/14: | UAA IRB Submittal  |
| 4/11/14: | Advisor-Approved Research Instruments and Analysis Methodology<br>Professional draft Presentation of Project<br>Final Project Management Plan<br>1 <sup>st</sup> Go/No-Go Decision |
| 4/21/14: | Final Presentation   |
| 4/28/14: | Final Project Management Plan<br>Refined Project Research, Deliverables, Outcomes<br>Final Presentation Slides<br>Lessons Learned Narrative<br>Knowledge Areas Narrative           |

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MAJOR MILESTONES	
<b>PM 686B Executing, Controlling, and Closing (September 05, 2014 thru December 08, 2014)</b>	
Dates:	
10/21/14	Change Control Process Updated Project Management Plan Risk Response Implementation Data Collection/Research Update Final GSP
10/28/14	Validated Research Analysis Signed Student/Advisory Committee Contract
11/11/14	Draft Paper Preliminary Conclusions and Project Deliverables 2 <sup>nd</sup> Go/No-Go Decision
11/21/14	Draft Presentation Final Project Report Final Project Deliverables Final Go/No-Go Decision
12/1/14	Final Oral Presentation
12/8/14	Final Report Lessons Learned Narrative Knowledge Areas Narrative



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**ASSUMPTIONS**

- Project Manager has access to necessary software programs (Microsoft Office, WBS Chart Pro, Blackboard, Backbone).
- Advisors will review and give constructive feedback on draft project deliverables.
- This project assumes the SMEs are receptive and willing to participate in the interview process.
- Project Stakeholders have adequate time to review and approve project deliverables.

**CONSTRAINTS**

- Project Progress Milestone (PPM) dates as specified in 686A and 686B syllabi (see attached)
- Advisor and committee members time availability

**PROJECT RISKS**

<b>RISK</b>	<b>IMPACT ON PROJECT</b>	<b>MITIGATION STRATEGY</b>	<b>CRITICALITY</b>	<b>PROBABILITY</b>
1. Committee Advisor time availability	<ul style="list-style-type: none"> <li>• Delay project deliverables</li> <li>• Quality of project deliverables</li> </ul>	Inform Committee Advisor of PMP deliverables expected review dates via class announcement, e-mail, phone, UAA collaboration area web site, and UAA PPM & deliverables web site	<b>High</b>	50%
2. SME participation	Delay project deliverables	Coordinate with GPO and GOO general managers to acquire support	<b>High</b>	10%
3. Adequate survey questions	<ul style="list-style-type: none"> <li>• Inadequate survey</li> <li>• Delay project deliverables</li> </ul>	<ul style="list-style-type: none"> <li>• Generate questions with qualified SME</li> <li>• Coordinate with committee advisors</li> </ul>	<b>Medium</b>	30%

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4. Critical Resources review / recommendations	Quality of project deliverables	<ul style="list-style-type: none"><li>• Review project schedule with committee team to acquire approval</li><li>• Generate Student/Advisory Committee Contract</li></ul>	<b>Medium</b>	30%
5. Acquire Project Management Software	Delay project deliverables	Download demo versions from websites and UAA Faculty Staff	<b>High</b>	10%
6. BP Exploration Alaska Legal Support	Delay project deliverables	<ul style="list-style-type: none"><li>• Verify project deliverables are not proprietary to BP Exploration Alaska</li><li>• Set up meeting to discuss project deliverables prior to PM686A class completion and at PM686B project conclusion</li></ul>	<b>High</b>	30%
7. Project Manager time availability to develop, review, modify, and submit project deliverables	Can cause project delays.	<ul style="list-style-type: none"><li>• Re-baseline project execution schedule which enables Project SOW completion with deliverable dates as specified in PM686B syllabus.</li><li>• Submit change request form and update change log.</li><li>• Acquire Advisor approval to proceed with PM 686B class.</li></ul>	<b>High</b>	70%

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8. Submittal of Quality Paper in PM 686B PPM#3	Delay project deliverables	<ul style="list-style-type: none"> <li>• Add Advisory Committee and BP Stakeholder review task to Gantt Chart</li> <li>• Submit preliminary paper to Advisory Committee and BP Stakeholder</li> <li>• Review paper with Advisory Committee and BP Stakeholders</li> <li>• Revise and update Project Paper and submit to BP Legal Counsel</li> <li>• Revise and update Paper with BP Legal Counsel comments</li> </ul>	<b>High</b>	20%
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KEY STAKEHOLDERS		
	<b>PROJECT SPONSORS</b> (SEE ROLES & RESPONSIBILITIES BELOW)	
	Michael Spitz PMT FEL TL	
	<b>PROJECT MANAGEMENT</b> (SEE ROLES & RESPONSIBILITIES BELOW)	
	Carlos Lujan PMT PL	
CORE TEAM (TECHNICAL) (SEE ROLES & RESPONSIBILITIES BELOW)		
LuAnn Piccard Project Advisor	Walter Almon Committee Member	William Thompson Committee Member

**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

ROLES & RESPONSIBILITIES		
ROLES	RESPONSIBILITIES	CONTACT PERSON
PROJECT SPONSOR	<ul style="list-style-type: none"> <li>• Authorize &amp; approve project</li> <li>• Approve project deliverables</li> <li>• Authorize project resources</li> <li>• Resolve issues</li> </ul>	Michael Spitz
BP EXPLORATION ALASKA LEGAL ADVISOR	<ul style="list-style-type: none"> <li>• Approve project deliverables</li> </ul>	Randal Buckendorf
PROJECT MANAGER	<ul style="list-style-type: none"> <li>• Coordinate team activities</li> <li>• Project planning</li> <li>• Monitor project progress</li> <li>• Resolve issues</li> <li>• Report project progress to the Project Sponsor.</li> <li>• Communicate issues to the Project Sponsors for resolution</li> </ul>	Carlos Lujan
CORE TEAM (TECHNICAL)	<ul style="list-style-type: none"> <li>• Serve as technical experts and share knowledge</li> <li>• Participate in team meetings &amp; discussions</li> <li>• Learn from other technical experts on the team to gain an understanding of the system</li> <li>• Apply technical expertise and judgment in the development of &amp; completion of project deliverables</li> <li>• Resolve Issues</li> </ul>	SMEs  LuAnn Piccard Walter Almon William Thompson

SIGN-OFF	
<b>PROJECT SPONSOR:</b> <u>Michael Spitz</u>	<b>DATE:</b> <u>2/12/14</u>
<b>PROJECT MANAGER:</b> <u>Carlos Lujan</u>	<b>DATE:</b> <u>2/12/14</u>
<b>PROJECT ADVISOR:</b> <u>Walter Almon</u>	<b>DATE:</b> <u>2/28/14</u>

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**C. Sponsor Letters**

**BP Exploration (Alaska) Inc. Letter of Support**

**March 28th 2014**

Attn: Institutional Review Board  
Office of Research and Graduate Studies  
University of Alaska Anchorage  
3211 Providence Drive  
Anchorage, AK 99508

Dear IRB Members,

This memo certifies that **Carlos Lujan** has shared and discussed the study titled Development of a Prioritization Tool for BP Exploration Alaska Category C Projects with myself a representative of our company, BP Exploration Alaska.

Carlos Lujan has shared his Project Management Plan, dated 3/13/14, with myself. This memo also confirms that **Carlos Lujan** has permission to conduct the above stated study at BP Alaska for the Master of Science in Project Management (MSPM) at the University of Alaska Anchorage.

I do not have concerns about the proposed study based on communication with **Carlos Lujan**. The company supports the research plan and approves of the project, which includes survey of participants and data collection, through our company.

Sincerely,



**Michael D Spitz, PE**

FEL Team Lead, Projects & Modifications  
**BP Exploration Alaska**

Office: 907.564.4926  
Cell: 907.317.3914



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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Carlos Lujan, MSPM Student**

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Lujan, Carlos (BP)

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From: Spitz, Michael  
Sent: Tuesday, February 04, 2014 5:07 PM  
To: Lujan, Carlos (BP)  
Subject: RE: PM 686A PPM#1 Deliverable - Letter of Support from Project Sponsor

Carlos,  
I think this will be a good project for you and for BP. I'm happy to support this in any way that I can.

**Michael D Spitz, PE**  
FEL Team Lead, Projects & Modifications  
BP Exploration Alaska  
Office: 907.564.4926  
Cell: 907.317.3914

---

From: Lujan, Carlos (BP)  
Sent: Saturday, February 01, 2014 3:58 PM  
To: Spitz, Michael  
Subject: PM 686A PPM#1 Deliverable - Letter of Support from Project Sponsor

Mike,

Please review preliminary project thesis abstract listed below:

BP Exploration Alaska Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category "C" projects (range from \$200,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process. The production of oil and gas is declining in Alaska and forecasts of future development are uncertain. It is critical that the prioritization process for Cat C projects be clearly developed and understood to maximize BP's return on investment and to ensure that the existing process facilities retain their rights to operate through continued operational integrity with fit-for-service improvements.

This research paper will provide a step-by-step process to assist with defining business objectives and the subsequent prioritization for BP Cat C projects. An analysis of existing BP Cat A and B business objectives and prioritization literature will provide background information on current strategies. Analysis of interviews with Subject Matter Experts (SMEs) from BP Cat A and B Global Projects Organization will provide their view points on the subject. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries will be examined. This product-oriented project will include research, development, design, and documentation to logically apply a step-by-step PMT process to identify business objectives to assist

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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with Cat C project prioritization.

I believe this abstract addresses the PMT Cat C deliverables we have previously discussed. Please let me know if there is anything else I should include.

Please respond with an email with your support of my thesis project if you agree with abstract listed above. Thank You,

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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---

**D. BP Legal Counsel Approval to Proceed with Project**

Lujan, Carlos (BP)

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From: Buckendorf, Randal  
Sent: Monday, April 07, 2014 4:50 PM  
To: Lujan, Carlos (BP)  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP  
Proprietary Information

Carlos,

I enjoyed visiting with you about your Thesis proposal. As we discussed, the information is confidential but you have the support of the key and relevant management to use it as part of seeking your Master's Degree in project management. Nothing however is proprietary in nature that you cannot use it as part of the project. I support you proceeding forward. As we discussed, I would like the opportunity to review the final Thesis submittal prior to its submission to the University.

Thanks for seeking out legal input.

Randal

---

From: Lujan, Carlos (BP)  
Sent: Monday, April 07, 2014 3:28 PM  
To: Buckendorf, Randal  
Subject: FW: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

Please review project management plan attached. Please send me an email and let me know that I do have permission from BP to interview subject matter experts and that the tool I will be developing is something I can present and not considered confidential.

Thank You,

**Carlos Lujan**

**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

---

From: Lujan, Carlos (BP)  
Sent: Monday, March 17, 2014  
1:21 PM To: Spitz, Michael  
([Michael.Spitz@bp.com](mailto:Michael.Spitz@bp.com)) Cc:  
Okonek, Les J  
Subject: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Mike,



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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---

Please review project management plan attached. Please send me an email and let me know that I do have permission from BP to interview subject matter experts and that the tool I will be developing is something I can present and not considered confidential.

Thank You,

**Carlos Lujan**

**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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Carlos Lujan, MSPM Student**

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Lujan, Carlos (BP)

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From: Lujan, Carlos (BP)  
Sent: Wednesday, November 19, 2014 11:51 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael; 'LuAnn Piccard'  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP  
Proprietary  
Information

Randal,

I will make modifications as you have suggested. You had mentioned that this is a good paper. I will submit paper to the University of Alaska Anchorage by Friday 11/21/14.

Once again, I thank you for your time and

effort. Have a great day.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

---

From: Buckendorf, Randal  
Sent: Wednesday, November 19, 2014 11:23 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Carlos,

I took the paper home last night and have some comments for you. I tried to drop off at your desk at the office listed in the GAL but it said 942d which is vacant. Not sure where you let me know I will drop them off as I head down to lunch. I will also try 12 where Walt and Mike are.

Randal

---

From: Lujan, Carlos (BP)  
Sent: Tuesday, November 18, 2014 9:37 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

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I was able to meet and review the document with Mike Spitz, Ray Schulte, and Walter Almon yesterday. I've incorporated their comments into the paper. I have also received endorsements (attached emails) from each individual to move forward.

I must submit this paper to the University of Alaska Anchorage by Thursday evening 11/20/14. Please review and let me know if there is anything else you require. If there are no other requirements, please send an email with your approval.

I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 10:28 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Thanks Carlos.

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:57 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

I have pulled together document with Ray Schulte (PMT Risk Manager) review. I will meet with Mike Spitz (PMT FEL TL), Walt Almon (Ops Mech, Civil & Lift Engineer Team Lead, Alaska Operations-Engineering Svcs), and Ray Schulte to review and approve. I will send you an email and leave a message when this task is completed.

I thank you again for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 9:47 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary

Information Prior to my review I need to know that everyone in Projects has reviewed and approved this as well. Randal

---

From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:36 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

Please review preliminary project paper. I believe I have documented information which is not proprietary to BP. I would like to set up a meeting with you early this week to discuss. I need your approval to submit final paper and complete PM 686B course. I will call to follow up.

I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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## **E. Research Sources and Key Words**

### **Introduction**

This document contains the preliminary sources and key words for researching.

### **Research Sources**

Literature research sources will comprise of the existing BP Exploration Alaska Project Category A and B Business Objective Prioritization processes to gain understanding of background and current strategies. Initial literature research will focus on business objective selection criteria. Then literature research focus will lead into prioritization of business objectives selection.

Survey questionnaire with follow-up interviews with Subject Matter Experts (SMEs) from BP Exploration Alaska Cat A and B Global Projects Organization will provide their view points on the subject.

Survey questionnaire with follow-up interviews with ConocoPhillips and Exxon Mobil SMEs will provide their organization's priority strategies with similar budget boundaries.

### **Key Words**

1. Stage Gated Project Development Process
2. Budget Boundaries
3. Business Categories
4. Defining Business Objectives
5. Business Objectives Criteria
6. Business Objectives Prioritization Process
7. Business Objectives Prioritization Matrix
8. Facility Optimization
9. Facility Future Plan
10. Field Future Plan
11. Reliability and Operability
12. Business Case Analysis
13. Setting Business Priorities

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**F. Description of Expected Research Methods, Results, and Approach to Analysis**

**Introduction**

This document contains the preliminary research methods and approach to analysis.

**Research Methods**

The research methods employed in this project will consist of literature review and interviews with survey questionnaire.

**Literature Review**

Literature research sources will comprise of the existing BP Exploration Alaska Project Category (Cat) A and B Business Objective Prioritization processes to gain understanding of background and current strategies. Initial literature research will focus on business objective selection criteria. Then literature research focus will lead into prioritization of business objectives selection. Literature review will be conducted to determine if current Cat C Objective Prioritization process has been developed to ensure originality of the project or to formulate an improved approach to current Cat C Objective Prioritization process.

**Interviews**

Interviews with Subject Matter Experts (SMEs) from BP Exploration Alaska Cat A and B Global Projects Organization will provide their view points on the subject. The interviewees are a mixture of planners, advisors, development leads, managers, and team leads all of whom apply the front end loading (FEL) engineering approach to develop business objectives and prioritize projects accordingly.

SME's are as listed:

- ██████████ – BP Operations Facility Planner
- ██████████ – BP Project Advisor
- ██████████ – BP Project Development Lead
- ██████████ – BP Appraise/Select Manager
- ██████████ – BP Project Risk Assurance Manager
- ██████████ – BP OPS Mech, Civil & Lift Engineering Team Lead
- ██████████ – BP Development Team Lead – PRP
- ██████████ – CH2M Hill Energy & Chemicals Pt. Thomson NS Installation Project Engineer

Note: The names of the SME's have been removed as specified in confidentiality clause in letter of consent form.

Interviews with ConocoPhillips and Exxon Mobil SMEs will provide their organization's priority strategies with similar budget boundaries.

SME's are yet to be determined.



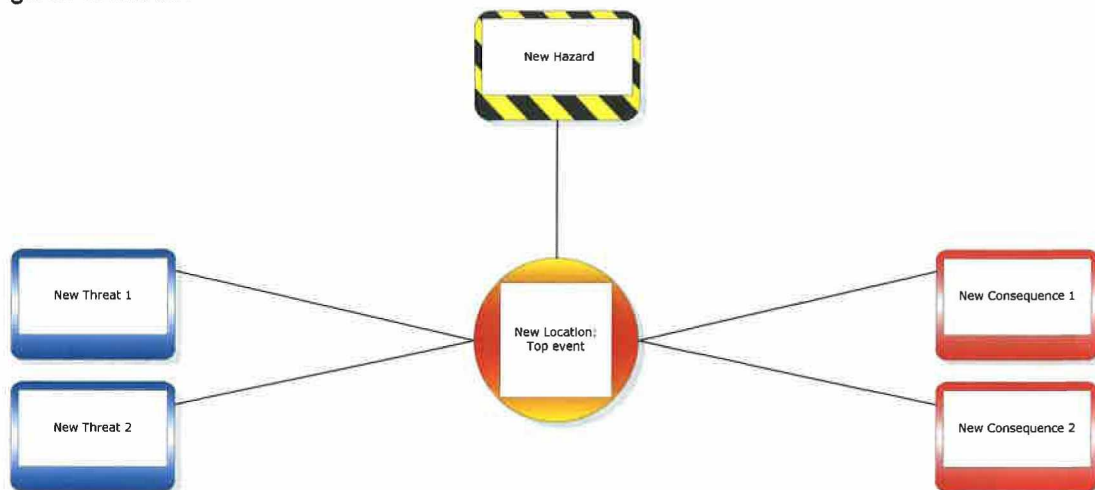
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## Surveys

A survey questionnaire will be distributed to subject matter experts (SMEs) with a follow-up one-on-one interview to discuss responses. Preliminary survey questions are as listed below:

1. Setting business priorities (SBP) can be a time consuming exercise: what does SBP offer the project lead and their team on projects both large and small?
2. There are four main categories of risk (financial, non-financial, environment, health safety and security) to look at for each project, what are examples of risk in each of the main categories?
3. How is the Bow Tie (risk analysis and SBP) method of communication valuable in determining a risk to a given situation?



**Figure 1.1. Bow Tie Method**

4. How is risk ranking helpful in determining the importance of a given risk?
5. Discuss the "If, Then, Resulting In" method of writing a risk statement. How can this be tied to the Bow Tie method?
6. During the SBP process, three overarching categories of decisions are considered; those being Overriding, Tradable, and Optional. What are the differences between the three categories and how do they contribute to building a value case for Cat C projects ranging from \$500K to \$15MM?
7. How does a project team frame a discussion within SBP or a project risk assessment? How would you apply to Cat C Projects?
8. What are the main value measures used to make decisions within the SBP process for application to Cat A and B? How can these value measures be applied or modified to address Cat C needs?



# Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects

## Project Management Plan

### Carlos Lujan, MSPM Student

Please review stick models illustrated below:

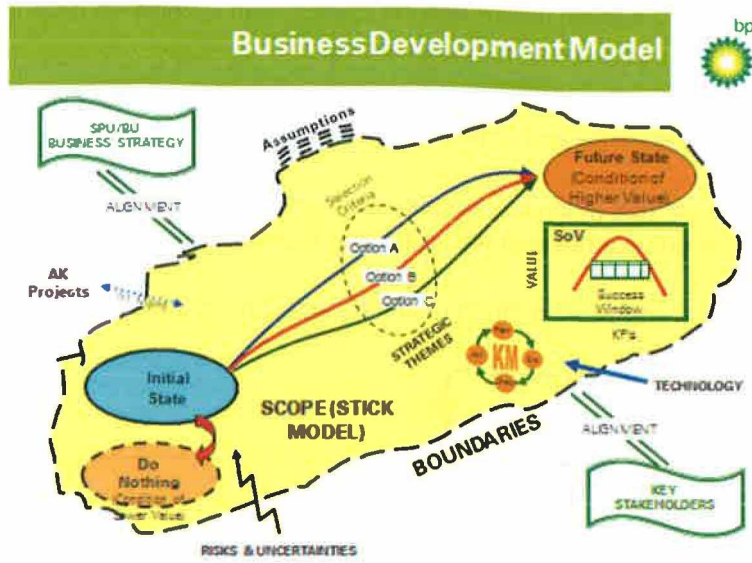


Figure 1.2. Stick Model Example

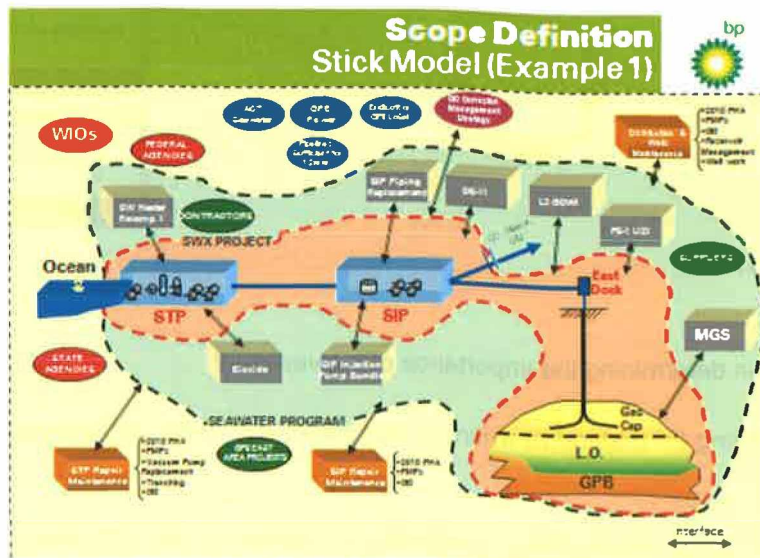


Figure 1.3. Application of Stick Model for \$75MM Project

9. What elements of the stick model examples are helpful when developing business drivers for Cat C projects?
10. How can SMART (Specific, Measureable, Attainable, Realistic, Timely) method be applied to assist in selection of Cat C project objectives?

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## **Analysis**

A qualitative deductive approach will be used to analysis the information gathered through literature research and interview data collection process.

Guidelines for selecting deductive analysis approach are as listed:

- Using your research questions to group the data and then look for similarities and differences
- Used when time and resources are limited

General procedures to complete analysis will consist of:

1. Begin with preliminary theories
2. Test the theories
3. Revise the theories
4. Organize findings based on revised theories

The above research methods and analysis approach will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.

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**G. Advisor-Approved Research Instruments and Analysis Methodology**

Lujan, Carlos (BP)

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From: LuAnn Piccard <[lpiccard2@uaa.alaska.edu](mailto:lpiccard2@uaa.alaska.edu)>  
Sent: Wednesday, April 09, 2014 2:02 PM  
To: Lujan, Carlos (BP)  
Subject: RE: Advisor-Approved Research Instruments and Analysis Methodology

Categories: CAUTION: External email – increased risk of phishing

I approve. Warm regards,

**LuAnn Piccard, PMP**

Department Chair, Engineering Science and Project Management  
(ESPM) School of Engineering

University of Alaska Anchorage  
University Center 155C  
Phone: 907.786.1917  
(office)

Cell: 970.443.1917 (Colorado Area  
Code) Fax: 907.786.1935

email: [lpiccard@uaa.alaska.edu](mailto:lpiccard@uaa.alaska.edu)

---

From: Lujan, Carlos (BP) [<mailto:Carlos.Lujan@bp.com>]  
Sent: Tuesday, April 08, 2014 8:48 PM  
To: LuAnn Piccard  
Subject: Advisor-Approved Research Instruments and Analysis Methodology

LuAnn,

Please reply with your approval of research instruments and analysis methodology. Please see attached documents for your review. Also attached is BP legal counsel approval from Randal Buckendorf and SME consent forms.

Thank You,

**Carlos Lujan**

**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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**H. Subject Matter Expert Consent Forms**

**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**

CONSENT FORM

PRINCIPAL INVESTIGATOR:

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

DESCRIPTION:

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

VOLUNTARY NATURE OF PARTICIPATION:

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

CONFIDENTIALITY:

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

BENEFITS:

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

RISKS:

There are no other known risks to you.

CONTACT PEOPLE:

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

SIGNATURE:

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature



Date

28 MAR 14

Printed Name

RAY C. SCHULTE, JR.

A copy of this consent form is available for you to keep.

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
Project Management Plan  
Carlos Lujan, MSPM Student**

---

**Development of a Prioritization Tool for BP Exploration Alaska Category C  
Projects**

**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature



Date: March 30, 2014

Printed Name: William Thompson

A copy of this consent form is available for you to keep.



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
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Carlos Lujan, MSPM Student**

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**Development of a Prioritization Tool for BP Exploration Alaska Category C  
Projects**

**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

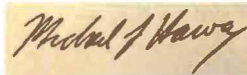
**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature



Date March 31, 2014

Printed Name Michael J Harvey

A copy of this consent form is available for you to keep.

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
Project Management Plan  
Carlos Lujan, MSPM Student**

---

**Development of a Prioritization Tool for BP Exploration Alaska Category C  
Projects**

**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature



Date

3/31/14

Printed Name

Frank M. Lujan

A copy of this consent form is available for you to keep.



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**

**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature

*Walter S. Almon*

Date

*3/21/14*

Printed Name

*Walter Almon*

A copy of this consent form is available for you to keep.

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**

**CONSENT FORM**

**PRINCIPAL INVESTIGATOR:**

Carlos Lujan  
Project Manager  
University of Alaska Anchorage  
(907) 564-5274

**DESCRIPTION:**

I am interested in the current strategy to determine project business objectives and prioritization of those objectives for Category A and B projects. You have been identified as a Subject Matter Expert in the front end loading of Capital Value Process through Appraise and Select stages. This research study will involve a survey questionnaire and a follow-up interview with you, each lasting approximately 30-60 minutes. The interviews will be documented via meeting minutes email to verify notes taken through interview process were captured correctly.

**VOLUNTARY NATURE OF PARTICIPATION:**

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, there will be no penalty or loss of benefits to you to which you are otherwise entitled. In other words, you are free to make your own choice about being in this study or not, and may quit at any time without penalty.

**CONFIDENTIALITY:**

Your name will not be attached to your interview responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me. Any information from this study that is published will not identify you by name.

**BENEFITS:**

There will be no direct benefit to you from participating in this study. The results of this study will enhance BP Category C project development of business objectives and prioritization.

**RISKS:**

There are no other known risks to you.

**CONTACT PEOPLE:**

If you have any questions about this research, please contact the Carlos Lujan at the phone number listed above.

**SIGNATURE:**

Your signature on this consent form indicates that you fully understand the above study, what is being asked of you in this study, and that you are signing this voluntarily. If you have any questions about this study, please feel free to ask them now or at any time throughout the study.

Signature

Kent Huay

Date

4/1/14

Printed Name

Kent Huay

A copy of this consent form is available for you to keep.

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**I. Description of Expected Project Deliverables and Outcomes**

**Introduction**

This document contains a description of expected project deliverables and outcomes.

**Expected Project Deliverables**

The research methods, results, and approach as specified in Appendix 11.6. will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with BP Exploration Alaska Cat C project prioritization.

More detail will be added upon survey and interview results.

**Expected Project Outcomes**

Expected project outcomes are as listed:

- Completion of thorough Capital Value Process (CVP) Pre-Appraise and Appraise process for BP Exploration Alaska Cat C projects.
- Acquisition of project support by BP managers to execute required projects through Capital Value Process (CVP).
- Cease deferment of projects which should be allowed to be executed without starting and stopping through execution of CVP process.
- Utilization of project funding more effectively and efficiently.

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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**Carlos Lujan, MSPM Student**

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**J. Signed Student/Advisory Committee “Contract”**

**Expectations for PM 686A and 686B Capstone Project Advising**

<b>Area of Responsibility</b>	<b>Student</b>	<b>Primary Advisor (1 person)</b>	<b>Committee Members (2 people)</b>	<b>Instructor of Record (IOR) and Admin Staff</b>
<b>Project Management</b>	<b>PRIMARY OWNER</b>	Coaching, feedback and assessment	Coaching, feedback and assessment input	
<b>Communication and Stakeholder Management</b>	<ul style="list-style-type: none"> <li>• Clear description of project</li> <li>• Proactive selection of Advisor and Committee members</li> <li>• Demonstrate effective communication and stakeholder management by determining and coordinating necessary and agreed modes and setting expectations for timing, and emphasis or tailoring of feedback and communication across with PA and committee (and other stakeholders)</li> <li>• Provide regular status reports as agreed with PA and committee</li> <li>• Identify and resolve communication issues</li> <li>• Identify, balance and resolve</li> </ul>	<ul style="list-style-type: none"> <li>• Email confirmation of agreement to serve</li> <li>• Availability as agreed</li> </ul>	<ul style="list-style-type: none"> <li>• Email confirmation of agreement to serve</li> <li>• Availability as agreed</li> </ul>	<ul style="list-style-type: none"> <li>• Faculty specialties matrix</li> <li>• Session Lectures</li> <li>• Syllabus</li> <li>• Blackboard materials</li> <li>• Announcements</li> <li>• AV set up</li> <li>• Final presentation schedule and logistics</li> <li>• Student and committee support as requested</li> <li>• Adjunct Faculty appointment letters</li> <li>• Escalation path</li> </ul>

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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**Carlos Lujan, MSPM Student**

	<ul style="list-style-type: none"> <li>contradictory inputs</li> <li>Discuss and get signatures for "Expectations" from student, advisor and committee members and submit to PM office.</li> </ul>			
<b>Project Deliverables</b>	<ul style="list-style-type: none"> <li>Complete work per syllabus</li> <li>Incorporate feedback from PA, committee and stakeholders</li> </ul>			
<b>Feedback</b>	<ul style="list-style-type: none"> <li>Determine type, timing and format of feedback from PA and committee</li> <li>Solicit, coordinate and integrate feedback from stakeholders, PA and committee for PPMs and final project deliverables</li> <li>Identify, balance and resolve contradictory inputs</li> </ul>	Provide agreed feedback on timely basis	Provide agreed feedback on timely basis	
<b>Final Presentation</b>	<ul style="list-style-type: none"> <li>Prepare</li> <li>Present</li> </ul>	<ul style="list-style-type: none"> <li>Attend</li> <li>Provide Feedback</li> </ul>	<ul style="list-style-type: none"> <li>Attend</li> <li>Provide Feedback</li> </ul>	<ul style="list-style-type: none"> <li>Coordinate schedule and logistics</li> </ul>
<b>Assessment and Grading</b>		<ul style="list-style-type: none"> <li>Coordinate input from committee for 4 PPMs and final project deliverables</li> <li>Assignment</li> </ul>	Provide input to primary advisor for: 4 PPMs Final deliverables	<ul style="list-style-type: none"> <li>Input 4 PPMs and final deliverables scores to Blackboard</li> <li>Ensure consistency</li> </ul>

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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**Carlos Lujan, MSPM Student**

		of PPM scores • Provide scores to IOR • Go/No checkpoint recommendation • Assign final grade	Go/No checkpoints	across students • Communicate go/no-go decisions to students • Input final grade to UA Online
<b>Administrative Documents</b>	• GSP preparation and submission to PM Office • Signed Expectations agreement • IRB submittal (686A) • Apply for graduation (686B) • RSVP for Hooding and commencement (686B)			• Graduate Studies Plan (GSP signatures and processing) • Include signed "Expectations" form in student file. • DF paperwork and annual progress report for students • Graduation Audit • Graduation Requirement Report (GRR) • Archive final project deliverables

***Student is responsible for obtaining the following signatures and submitting completed form to PM office to include in student file.***

I understand and agree to the expectations described above:

Student Signature: Carlos Lujan Date: 2/11/14  
 Advisor Signature: William Thompson Date: 2/14/14  
 Committee Member: Walter S. Almon Date: 2/12/14  
 Committee Member: Carlos Lujan Date: 2/12/14 Carlos Lujan

Student Signature: Carlos Lujan Date: 10/16/14  
 Advisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Committee Member: Walter S. Almon Date: 10/28/14  
 Committee Member: William Thompson Date: 10/20/14



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**K. Status Reports**

One Page PM 686A Project Status Report Dashboard

Name: Carlos Lujan

Date: 2/6/14

Project Title: Development of a Prioritization Tool for BP Exploration Alaska Cat C Projects

Synopsis of Project			Progress Since Last Report
This product-oriented project will include research, development, design, and documentation to logically apply a step-by-step PMT process to identify business objectives to assist with Cat C project prioritization.			<p>Tasks Completed:</p> <ul style="list-style-type: none"> <li>Preliminary Project Schedule</li> <li>Preliminary WBS</li> <li>200 Word Abstract</li> <li>Sponsor Letter</li> </ul> <p>Tasks Started:</p> <ul style="list-style-type: none"> <li>Stakeholder Identification and Analysis</li> <li>Project Charter</li> <li>Graduate Studies Plan (GSP)</li> <li>3-4 Knowledge Areas</li> </ul>
Current Status		x	Forecast
<p>I am behind on PPM #1 deliverables as listed above. I have generated a plan to re-group and complete with PPM #2 deliverables set.</p> <p>I will be on track to complete PPM#2 deliverables.</p>			My current schedule shows that I am on track to complete future deliverables on time.
Anticipated Changes/Key Risks/Corrective Actions			Key Takeaways/Where Help Needed
<p>Time constraints around work schedule limit my availability to focus solely on this project. I will dedicate my time off to focus on progressing this project to meet deliverable dates.</p> <p>Remaining PPM#1 deliverables will need to be incorporated into PPM#2 timeline delivery date to be on track.</p>			<p>I require project charter review and buy-in from PMT TL to assure completion.</p> <p>Discussion with PMT TL verified initial approval of project objective, but implementation timeline within BP organization will need to be presented to upper management.</p>



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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One Page PM 686A Project Status Report Dashboard

Name: Carlos Lujan

Date: 2/27/14

Project Title: Development of a Prioritization Tool for BP Exploration Alaska Cat C Projects

Synopsis of Project	Progress Since Last Report
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p>	<p>Tasks Completed: Review meetings and discussions with committee advisory members to further define and complete deliverables listed below:</p> <p><u>PPM #1 Deliverables</u></p> <p>Stakeholder Identification and Analysis  Project Charter  Graduate Studies Plan (GSP)  3-4 Knowledge Areas</p> <p><u>PPM #2 Deliverables</u></p> <p>Project Scope Statement  Project Requirements Documentation  Updated WBS  Updated Project Schedule  Table of Contents for Project Management Plan  Table of Contents for Final Project Report  Research Sources and Key Words  Preliminary Research Method and Approach to Analysis</p> <p>Tasks Started:</p> <p>Written Draft of Project Management Plan  IRB Review</p>
<p><b>Current Status</b></p> <div style="display: flex; align-items: center;"> <div style="width: 25px; height: 25px; background-color: red; margin-right: 5px;"></div> <div style="width: 25px; height: 25px; background-color: yellow; margin-right: 5px;"></div> <div style="width: 25px; height: 25px; background-color: green; margin-right: 5px; text-align: center; line-height: 25px;">X</div> </div>	<p><b>Forecast</b></p>
<p>I have completed PPM#1 and PPM#2 deliverables. I am on track to complete PPM#3 deliverables on time.</p>	<p>My current schedule shows tasks and deliverables completed to date. My current project completion percentage is at 24% which falls in line with PPM deliverables due to date. I am on track to complete future tasks and deliverables on time.</p>
Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
<p>Time constraints around work schedule limit my availability to focus solely on this project. I will continue to dedicate my time off to focus on progressing this project to meet deliverable dates.</p>	<p>Preliminary interview questions may require revision upon analysis of current CAT A &amp; B business objectives and prioritization literature.</p> <p>Project management plan will require review and comment from committee advisors.</p>

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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One Page PM 686A Project Status Report Dashboard

Name: Carlos Lujan

Date: 3/28/14

Project Title: Development of a Prioritization Tool for BP's Category C Projects

Synopsis of Project	Progress Since Last Report
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p> <p>The research methods as described in Appendix 11.9. (Description of Expected Project Deliverables and Outcomes), approach as specified in Appendix 11.6. (Description of Expected Research Methods, Results, and Approach to Analysis), and results will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.</p>	<p>Tasks Completed: Committee advisory comments incorporated into list of deliverables:</p> <ul style="list-style-type: none"> <li>• Abstract</li> <li>• Project Scope Statement</li> <li>• Research Method and Approach to Analysis</li> <li>• Research Sources and Key Words</li> <li>• Stakeholder Identification and Analysis</li> <li>• Project Charter</li> <li>• Project Requirements Documentation</li> <li>• Table of Contents for Project Management Plan</li> <li>• Requirements Traceability Matrix</li> <li>• Project Schedule</li> <li>• Project WBS</li> <li>• 3-4 Knowledge Areas Update</li> <li>• Added Change Management Plan to Project Management Plan.</li> </ul> <p>Tasks Started:</p> <ul style="list-style-type: none"> <li>• IRB Proposal</li> <li>• Verification that project is not considered confidential and acquiring BP permission to interview SME's.</li> </ul>
<p><b>Current Status</b></p> <div style="display: flex; align-items: center;"> <div style="width: 25px; height: 25px; background-color: red; margin-right: 5px;"></div> <div style="width: 25px; height: 25px; background-color: yellow; margin-right: 5px;"></div> <div style="width: 25px; height: 25px; background-color: green; margin-right: 5px; text-align: center; color: white;">X</div> </div>	<p><b>Forecast</b></p>
<ul style="list-style-type: none"> <li>• I have completed PPM#3 deliverables. I am on track to complete PPM#4 deliverables on time.</li> <li>• IRB Submittal will be 2-3 days behind schedule.</li> </ul>	<p>My current schedule shows tasks and deliverables completed to date. My current project completion percentage is at 46% which falls in line with PPM 686A deliverables due to date. Schedule to be updated with new IRB submittal date.</p>
Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
<ul style="list-style-type: none"> <li>• Time constraints around work schedule limit my availability to focus solely on this project. I will continue to dedicate my time off to focus on progressing this project to meet deliverable dates.</li> <li>• Project schedule and WBS will be updated to incorporate PM 686B deliverables and tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Interview questions may require revision upon analysis of current CAT A &amp; B business objectives and prioritization literature.</li> <li>• Project management plan requires review and comment from committee advisors. Date to submit comments project manager was 3/21/14. LuAnn Piccard submitted comments on Risk Register.</li> </ul>



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

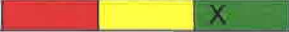
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One Page PM 686B Project Status Report Dashboard

Name: Carlos Lujan

Date: 9/5/14

Project Title: Development of a Prioritization Tool for BP's Category C Projects

Synopsis of Project	Progress Since Last Report
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p> <p>The research methods as described in Appendix 11.6. (Description of Expected Project Deliverables and Outcomes), approach as specified in Appendix 11.5. (Description of Expected Research Methods, Results, and Approach to Analysis), and results will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.</p>	<p>Tasks Completed: Committee advisory comments incorporated into list of deliverables:</p> <ul style="list-style-type: none"> <li>Research Method and Approach to Analysis (survey) distributed to a SME to comment on survey questions.</li> </ul>
Current Status	Forecast
 <ul style="list-style-type: none"> <li>I am updating my project schedule to include PM 686B class deliverables and tasks required to develop deliverables.</li> </ul>	<p>My updated schedule will show tasks and deliverables as described in PPM 686B syllabus.</p>
Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
<ul style="list-style-type: none"> <li>Time constraints around work schedule limit my availability to focus solely on this project. I will continue to dedicate my time off to focus on progressing this project to meet deliverable dates I set for myself.</li> <li>Project schedule and WBS will be updated to incorporate PM 686B deliverables and tasks.</li> </ul>	<ul style="list-style-type: none"> <li>Major challenge I have in the near term (October 31<sup>st</sup>, 2014) is balancing my work schedule with my academic objectives. Four weeks ago I was assigned a program which involves West Operating area (GC1, GC2, GC3) at 49 locations which require immediate scoping, planning, initiating, executing, monitoring and controlling through October 31<sup>st</sup>, 2014 deadline.</li> </ul>

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

One Page PM 686B Project Status Report Dashboard

Name: Carlos Lujan

Date: 9/26/14

Project Title: Development of a Prioritization Tool for BP's Category C Projects

Synopsis of Project	Progress Since Last Report
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p> <p>The research methods as described in Appendix 11.6. (Description of Expected Project Deliverables and Outcomes), approach as specified in Appendix 11.5. (Description of Expected Research Methods, Results, and Approach to Analysis), and results will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.</p>	<p>Tasks Completed: SME comments incorporated into list of deliverables:</p> <ul style="list-style-type: none"> <li>Research Method and Approach to Analysis Survey (3 steps) <ul style="list-style-type: none"> <li>Receive and Review survey comments</li> <li>Meet to discuss survey comments</li> <li>Release survey to BP SME's</li> </ul> </li> <li>Received BP SME comments from survey distribution. (4 of 8 SME's replied)</li> <li>Received BP proprietary information: <ul style="list-style-type: none"> <li>Business Prioritization Training PowerPoint</li> <li>Appraisal Best Practices (Examples, Power Point Presentations, Tools)</li> <li>Setting Business Priorities (SBP) Lessons Learned</li> <li>Global Operations Organization (GOO) Business Case Analysis (BCA) Examples</li> </ul> </li> <li>3 separate meetings with 2 SME's and BP Sponsor to discuss my project deliverables. All in agreement with my proposal.</li> </ul>
Current Status	Forecast
<div> <div></div> <div></div> <div>X</div> <div></div> <div></div> </div> <ul style="list-style-type: none"> <li>I am updating my project schedule to include PPM#1 deliverables make-up dates. I will be on track to meet PPM#2 deliverables.</li> </ul>	<p>I will be on track to meet PPM #2 Deliverables. Based on data collection to date and project deliverables buy in by SME's and sponsor, I believe am on track to meeting PM 686B deliverables.</p>
Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
<ul style="list-style-type: none"> <li>Time constraints around work schedule limit my availability to focus solely on this project. I will continue to dedicate my time off to focus on progressing this project to meet deliverable dates I set for myself.</li> <li>Project schedule and WBS will be updated to incorporate PM 686B deliverables and tasks.</li> </ul>	<ul style="list-style-type: none"> <li>Major challenge I have in the near term (October 31<sup>st</sup>, 2014) is balancing my work schedule with my academic objectives. Program which involves West Operating area (GC1, GC2, GC3) at 49 locations requiring continued scoping, planning, initiating, executing, monitoring and controlling through October 31<sup>st</sup>, 2014 deadline is still present.</li> </ul>



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

One Page PM 686B Project Status Report Dashboard

Name: Carlos Lujan

Date: 10/24/14

Project Title: Development of a Prioritization Tool for BP's Category C Projects

Synopsis of Project	Progress Since Last Report
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p> <p>The research methods as described in Appendix 11.6. (Description of Expected Project Deliverables and Outcomes), approach as specified in Appendix 11.5. (Description of Expected Research Methods, Results, and Approach to Analysis), and results will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.</p>	<p>Tasks Completed: SME comments incorporated into list of deliverables:</p> <ul style="list-style-type: none"> <li>• 3 separate meetings with 2 SME's and BP Sponsor to discuss my project deliverables. All in agreement with Project Manager deliverable proposal.</li> <li>• Advisor and Project Manager meeting to plan and implement tasks to re-baseline PM 686B project execution tasks which will enable Project Manager ability to progress forward.</li> <li>• Change Management Plan implemented to attain Advisor approval to re-baseline PPM#1, PPM#2, and PPM#3 delivery dates.</li> <li>• Risk register updated and risk response implementation initiated and progressed.</li> <li>• PPM#1 submitted</li> <li>• PPM#2 75 percent complete</li> <li>• Data Analysis 70 percent complete</li> <li>• Project Report started</li> </ul>
Current Status	Forecast
<p>PM 686A &amp; 686B Class Deliverables – 76% Complete</p> <ul style="list-style-type: none"> <li>• PPM #3 Deliverable is to be submitted 11/7/14. My revised PPM #3 submittal date is 11/11/14. Project is tracking to 11/11/14 submittal.</li> </ul>	<p>Project is tracking to meet PPM#2 and PPM#3 revised delivery dates as specified on Change Request Form and Change Log. I am on track to meeting PM 686B PPM#4 and rest of project deliverables.</p>
Anticipated Changes/Key Risks/Corrective Actions	Key Takeaways/Where Help Needed
<ul style="list-style-type: none"> <li>• Project Manager submittal of Quality paper/Allow Committee Advisory team time to review and respond with comments. Project Manager inform Committee Advisory team in advance of draft paper submittal.</li> <li>• BP Exploration Alaska Legal Counsel approval for Project Deliverables/Schedule review meeting with BP Counsel between 11/3-11/7.</li> </ul>	<ul style="list-style-type: none"> <li>• Reminder- Advisor Approval of Expected Research Methods, Results, and Approach to Analysis submitted 11/23/14. Initially approved by Advisor 4/9/14.</li> <li>• Advisory Committee team review of draft paper 11/4/14 thru 11/6/14.</li> </ul>


**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
Project Management Plan  
Carlos Lujan, MSPM Student**

One Page PM 686B Project Status Report Dashboard

Name: Carlos Lujan

Date: 11/14/14

Project Title: Development of a Prioritization Tool for BP's Category C Projects

Synopsis of Project		Progress Since Last Report	
<p>This project will develop a tool to define and quantify business drivers for BP Cat C projects. This tool will help prioritization process for Cat C projects. The project will develop and clarify business objectives in relation to the Cat C projects, therefore maximizing BP's return on investment and ensuring that fit-for-service improvements are selected for execution which will retain BP facility's rights to operate.</p> <p>The research methods as described in Appendix 11.6. (Description of Expected Project Deliverables and Outcomes), approach as specified in Appendix 11.5. (Description of Expected Research Methods, Results, and Approach to Analysis), and results will provide the foundation to develop a business objectives criteria definition, design an analytical hierarchical process matrix, and document a logical step-by-step application tool to identify and quantify business objectives to assist with Cat C project prioritization.</p>		<p>Tasks Completed: SME comments incorporated into list of deliverables:</p> <ul style="list-style-type: none"> <li>• 2separate meetings with 2 SME's to discuss my project deliverables. All in agreement with Project Manager deliverable proposal.</li> <li>• Advisor and Project Manager meeting to plan and implement tasks to re-baseline PM 686B project execution tasks which will enable Project Manager ability to progress forward.</li> <li>• Change Management Plan implemented to attain Advisor approval to re-baseline PPM#3 delivery date.</li> <li>• Risk register updated and risk response implementation initiated and progressed.</li> <li>• PPM#2 submitted</li> <li>• Data Analysis 95 percent complete</li> <li>• Project Report 90 percent complete</li> <li>• Project PowerPoint 10 percent complete</li> </ul>	
Current Status		Forecast	
<p>PM 686A &amp; 686B Class Deliverables – 90% Complete</p> <ul style="list-style-type: none"> <li>• PPM #3 Deliverable is to be submitted 11/14/14. My revised PPM #3 submittal date is 11/14/14. Project is tracking to 11/16/14 submittal.</li> </ul>		<p>Project is not tracking to meet PPM#3 revised delivery date of 11/14/14 as specified on Change Request Form and Change Log. Project Lead will submit PPM#3 deliverables 11/16/14. Project on track to meeting PM 686B PPM#4 and rest of project deliverables.</p>	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<ul style="list-style-type: none"> <li>• Project Manager submittal of Quality paper/Allow Committee Advisory team time to review and respond with comments. Project Manager inform Committee Advisory team in advance of draft paper submittal.</li> <li>• BP Exploration Alaska Legal Counsel approval for Project Deliverables/Schedule review meeting with BP Counsel between 11/17-1/21</li> </ul>		<ul style="list-style-type: none"> <li>• Advisory Committee team review of draft paper 11/18/14 thru 11/21/14.</li> </ul>	



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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**L. Project Requirements (Traceability Matrix) Documentation**

Requirements Traceability Matrix								
Functional Area	Functional Requirement	Specific Requirement	WBS ID	Primary Stakeholder (Acceptance)	Responsible	Verification	Validated?	Date
Project Management	Project Management Plan (686A & 686B)	Abstract (686A)	1.1.1.2	Sponsor	PM	Abstract has been reviewed and approved	Yes	2/4/2014
		Abstract (686B)	1.1.1.2.2	PM	PM	Scope of work has not changed	Yes	9/10/2014
		Sponsor Letter	1.1.1.3	Sponsor	PM	Sponsor letter received	Yes	2/4/2014
		Project Charter (686A)	1.1.1.4	Sponsor	PM	Project charter has been reviewed and approved	Yes	2/12/2014
		Project Charter (686A)	1.1.1.4	Advisory Committee	PM	Project charter has been submitted for review	Yes	2/19/2014
		Project Charter Update (686B)	1.1.1.4.3	PM	PM	Scope of work has not changed. PM 686B deliverable dates added.	Yes	10/16/2014
		Stakeholder Identification & Analysis (686A & 686B)	1.1.2.1	Advisory Committee	PM	Stakeholders have been identified and major requirements stated. No change required for PM 686B.	Yes	2/13/2014 & 9/20/2014
		Scope Statement (686A)	1.1.3.1	Advisory Committee	PM	Scope statement has been created and describes the inclusions, exclusions, assumptions, and constraints.	Yes	2/20/2014
		Scope Statement (686B)	1.1.3.1.5	Advisory Committee	PM	Scope statement does not require modification as scope of work has not changed	Yes	10/24/2014

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		Project Schedule (686A & 686B)	1.1.5.1	Advisory Committee	PM	Project schedule is complete for 686A and shows all work involved to complete 686B	Yes	10/24/2014
		WBS (686A)	1.1.3.2	Advisory Committee	PM	WBS has been created and shows % of task completed	Yes	4/27/2014
		WBS (686B)	1.1.3.2.2	Advisory Committee	PM	Project WBS updated to show PM686B deliverables and shows % of task complete	Yes	12/2/2014
		Risk Management Plan (686A)	1.1.4	Advisory Committee	PM	Risk management plan determines the priority of risks, mitigation measures, and response plans.	Yes	4/27/2014
		Risk Management Plan (686B)	1.1.4.2	Advisory Committee	PM	Update and maintain risk register	Yes	12/2/2014
		Scope Management Plan (686A)	1.1.3	Advisory Committee	PM	Scope Management plan will be created to include change management and how the scope will be managed and verified	Yes	2/27/2014
		Change Control Plan (686B)	1.1.1.6	Advisory Committee	PM	Execute change control plan and maintain change log	Yes	11/24/2014
		Research Methods, Results, and Analysis (686A)	1.2.11.1.1	Advisory Committee	PM	Preliminary research approach methods, results, and analysis have been documented and approved for PM 686A.	Yes	2/20/2014

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		Data Collection (686B)	1.2.11.1.10	PM	PM	Data collected is proprietary information to BP	Yes	9/20/2014
		Analyze Data (686B)	1.2.11.1.11	PM	PM	Data analysis in progress	Yes	11/3/2014
		Project Paper (686B)	1.2.11.1.12	Advisory Committee	PM	Project paper development in progress	Yes	11/21/2014
	IRB Submittal (686A)	Research Methods, Results, and Analysis (686A)	1.2.11.1.1	Advisory Committee	PM	Preliminary research approach methods, results, and analysis have been documented and approved for PM 686A.	Yes	2/20/2014
		Research Sources & Key Words (686A)	1.2.11.1.2	Advisory Committee	PM	Research resources and key words have been documented	Yes	2/20/2014
Oral Presentation	Power Point (686A & 686B)	Power Point Slides (686A)	1.3.1	Advisory Committee	PM	The paper's abstract has been updated and describes the research topic and method	Yes	4/21/2014
		Slide Notes (686A)	1.3.2	Advisory Committee	PM	Research methods are described	Yes	4/21/2014
		Power Point Slides (686B)	1.3.9	Advisory Committee	PM	Review with Committee Member	Yes	11/25/2014
		Slide Notes (686B)	1.3.10	Advisory Committee	PM	Review with Committee Member	Yes	11/25/2014
	Presentation (686A & 686B)	Present 30 min (686A)	1.3.7	Advisory Committee	PM	PM 686A presentation has been created and describes approved Project Management Plan	Yes	4/21/2014
		Present 45 min (686B)	1.3.14	Advisory Committee	PM	PM 686B presentation has been created	Yes	12/1/2014

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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						and describes Executing, Controlling, and Closing processes and Project deliverables.		
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**M. Application & Performance of 3 Knowledge Areas (PM 686A PPM Deliverables)**

Knowledge Area	Application	Performance Measurement	PM 686A PPM#2 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Create a communications management plan that ensures that stakeholders are informed through execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Generate stakeholder requirements documentation</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders documented through execution.</li> <li>Adherence to project communication plan report.</li> <li>Document stakeholder feedback and submit deliverable prior to due date.</li> <li>Document validation of requirements met through execution.</li> </ul>	<ul style="list-style-type: none"> <li>Additional stakeholders (Subject Matter Expert names) have been identified.</li> <li>Committee advisory members informed of PPM #2 deliverable distribution via collaboration area and email for review and comment.</li> <li>Meetings with advisory committee members conducted and minutes distributed to capture main topics with advisory review comments.</li> <li>Advisory committee comments incorporated into PPM#2 deliverables submitted prior to due date.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft project and WBS chart pro programs updated to allow for additional WBS task detail as requested by advisor.</li> <li>Gantt chart revisited 3 times (2/12, 2/15, 2/16) to provide timely updates with accurate task completion percentages.</li> <li>Gantt chart and WBS updates show project at 24% completion which corresponds with PPM deliverables and shows project in on schedule.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Develop project charter</li> <li>Develop project management plan. <ul style="list-style-type: none"> <li>Develop change management plan.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Incorporate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> </ul>	<ul style="list-style-type: none"> <li>Project deliverables are complete to date except for GSP and Project Charter. GSP to be submitted by Meuy Saechao when "GO" decision is given by advisor. Advisor to sign project charter and return to project manager. Status also noted in Gantt chart submittal.</li> <li>Advisory committee members requested implementation of project deliverables (business objectives criteria definition, analytical hierarchical process matrix, and documentation to apply a step-by-step process tool) into organization prior to completion of 686A/686B project. This scope creep request was not approved as implementation of project deliverables into organization would require upper management approval outside sponsor's authority and beyond 686A/686B time</li> </ul>



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
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			<p>constraints for execution.</p> <ul style="list-style-type: none"><li>• Scope statement comments by advisory committee to further define project drivers accepted by project manager and implemented into document deliverable.</li><li>• Accepted advisory committee comments into scope statement impacted front end loading survey questions.</li></ul>
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**Figure 1.1 Knowledge Area Table**



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
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Knowledge Area	Application	Performance Measurement	PM 686A PPM#3 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Create a communications management plan that ensures that stakeholders are informed through execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Generate stakeholder requirements documentation</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders documented through execution.</li> <li>Adherence to project communication plan report.</li> <li>Document stakeholder feedback and submit deliverable prior to due date.</li> <li>Document validation of requirements met through execution.</li> </ul>	<ul style="list-style-type: none"> <li>Additional stakeholders (Subject Matter Expert names) have been identified.</li> <li>Committee advisory members informed of PPM #3 deliverable draft Project Management Plan not available for review prior to 3/14/14 submittal date. Distribution via collaboration area and email for review and comment.</li> <li>PPM#2 advisory committee comments incorporated into all project documents and also distributed through PPM#3 deliverables prior to due date 3/14/14.</li> <li>Communications management plan added to draft Project Management Plan.</li> <li>Response to add advisory committee PPM #2 comments to all project documents via collaboration area and email as specified in draft Project Management Plan.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft project and WBS chart pro programs updated to allow for additional WBS task detail as requested by advisor.</li> <li>Gantt chart revisited 2 times (3/3, 3/13) to provide timely updates with accurate task completion percentages.</li> <li>Gantt chart and WBS updates show project at 46% completion which corresponds with PPM deliverables and shows project is on schedule.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Develop project charter</li> <li>Develop project management plan. <ul style="list-style-type: none"> <li>Develop change management plan.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Incorporate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> </ul>	<ul style="list-style-type: none"> <li>Project deliverables are complete to date except for GSP. GSP to be submitted by Meuy Saechao when "GO" decision is given by advisor. Status also noted in Gantt chart submittal.</li> <li>PPM #2 Scope statement comments by advisory committee to change title accepted by project manager and all corresponding project documents have been updated and submitted through PPM#3 and added to preliminary Project Management Plan.</li> <li>Change management plan developed and added to preliminary Project Management Plan. Change requests for development of PPM#1 and PPM#2 deliverables to date and future can now be documented, evaluated, and tracked.</li> </ul>

**Figure 1.2 Knowledge Area Table**

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
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Knowledge Area	Application	Performance Measurement	PM 686A PPM#4 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Create a communications management plan that ensures that stakeholders are informed through execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Generate stakeholder requirements documentation</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders documented through execution.</li> <li>Adherence to project communication plan report.</li> <li>Document stakeholder feedback and submit deliverable prior to due date.</li> <li>Document validation of requirements met through execution.</li> </ul>	<ul style="list-style-type: none"> <li>Additional stakeholder (BP Exploration Alaska Legal Counsel) has been identified and added to Project Management Plan documentation.</li> <li>Committee advisory members informed of PPM #4 deliverables available for review 4/11/14 via email and UAA PPM and deliverables submission web site.</li> <li>PPM#3 advisory committee comments incorporated into all project documents and also distributed through PPM#4 deliverables prior to due date 4/11/14.</li> <li>Communications management plan revised to incorporate BP Exploration Alaska Counsel reviews.</li> <li>Response to add advisory committee PPM #3 comments to all project documents via collaboration area and email as specified in Project Management Plan.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> </ul>	<ul style="list-style-type: none"> <li>BP Exploration Alaska Legal Counsel review task added to WBS and project schedule.</li> <li>Gantt chart revisited 2 times (4/6, 4/9) to provide timely updates with accurate task completion percentages.</li> <li>Gantt chart and WBS updates show PM686A class deliverables at 84% complete which corresponds with PPM deliverables and shows project is on schedule.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Develop project charter</li> <li>Develop project management plan. <ul style="list-style-type: none"> <li>Develop change management plan.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Incorporate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> </ul>	<ul style="list-style-type: none"> <li>Project deliverables are complete to date except for GSP. GSP to be submitted by Meuy Saechao when "GO" decision is given by advisor. Status also noted in Gantt chart submittal.</li> <li>PPM #3 Abstract comments by advisory committee accepted by project manager and all corresponding project documents have been updated and submitted through PPM#4.</li> <li>Change management plan developed and added to preliminary Project Management Plan. Change requests for development of PPM#1, PPM#2, and PPM#3 deliverables to date and future can now be documented, evaluated, and tracked.</li> </ul>

**Figure 1.3 Knowledge Area Table**



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
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**N. Application & Performance of 3 Knowledge Areas (PM 686B PPM Deliverables)**

Knowledge Area	Application	Performance Measurement	PM 686B PPM#1 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Execute communications management plan that ensures that stakeholders are informed through project execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Update and distribute stakeholder requirements documentation and distribute as required.</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders to be documented in project management plan and updated through project execution.</li> <li>Adherence to project communication plan.</li> <li>Document stakeholder feedback and submit deliverable prior to due dates.</li> <li>Document validation requirements as described in change management plan and distribute to appropriate stakeholder committee members.</li> <li>Inform committee advisory members on changes as they occur.</li> </ul>	<ul style="list-style-type: none"> <li>PM 686B PPM#1 and PPM#2 deliverables meeting requested 10/9/14. Meeting conducted at project Advisor office 10/10/14. Clear directive for Project Manager to attain approval to precede with project development deliverables through PM 686B presented.</li> <li>Change request form submitted to Advisor and Committee members via email.</li> <li>Change management log updated with change request to extend PPM#1, PPM#2, and PPM#3 deliverables to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.</li> <li>Updated Student/Advisory Committee Expectations Contract re-distributed to attain fall semester 2014 signatures.</li> <li>Project schedule distributed to advisor and committee members to illustrate project deliverables are attainable with-in project constraint end date of December 8<sup>th</sup>, 2014.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> <li>Update Gantt chart through execution and inform project stakeholders of project WBS task progression.</li> </ul>	<ul style="list-style-type: none"> <li>Gantt chart updated to incorporate PM 686b project deliverables.</li> <li>Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and project paper at 60% complete which is accurate with 10/18/14 project status date.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Integrate project charter</li> <li>Implement project management plan.</li> <li>Implement change management plan.</li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Integrate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> <li>Distribute change management plan deliverables to stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Project charter and project management plan updated with PM 686B course PPM and project deliverables.</li> <li>Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001.</li> <li>Change management log updated with Change request PM686B-001.</li> </ul>

**Figure 1.1 Knowledge Area Table**

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

Knowledge Area	Application	Performance Measurement	PM 686B PPM#2 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Execute communications management plan that ensures that stakeholders are informed through project execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Update and distribute stakeholder requirements documentation and distribute as required.</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders to be documented in project management plan and updated through project execution.</li> <li>Adherence to project communication plan.</li> <li>Document stakeholder feedback and submit deliverable prior to due dates.</li> <li>Document validation requirements as described in change management plan and distribute to appropriate stakeholder committee members.</li> <li>Inform committee advisory members on changes as they occur.</li> </ul>	<ul style="list-style-type: none"> <li>PM 686B PPM#1 submitted to UAA website and distributed via email to advisory committee members.</li> <li>Change management log updated with change request to extend PPM#1, PPM#2, and PPM#3 deliverables to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.</li> <li>Change request form and change log approved by advisor and submitted to Project Manager via email.</li> <li>PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.</li> <li>Meeting with Walter Almon to discuss: <ul style="list-style-type: none"> <li>- PPM #1, PPM#2, and PPM#3 submittal dates</li> <li>- Committee Advisory paper review dates</li> <li>- Change Request Form and Change Log</li> <li>- PM 686B Student/Advisory Commitment Contract</li> </ul> </li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> <li>Update Gantt chart through execution and inform project stakeholders of project WBS task progression.</li> </ul>	<ul style="list-style-type: none"> <li>Gantt chart updated to incorporate PM 686B project deliverables.</li> <li>Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and at 86% complete which is accurate with 10/28/14 project status date.</li> <li>WBS update illustrates percentage complete for Integration 86%, Communication 90%, Scope 89%, Risk 90%, and Time Management 80%.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Integrate project charter</li> <li>Implement project management plan.</li> <li>Implement change management plan.</li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Integrate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> <li>Distribute change management plan deliverables to stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001.</li> <li>Change management log updated with Change request PM686B-001.</li> <li>Requirements traceability matrix, risk register and risk response implementation updated.</li> </ul>

**Figure 1.2 Knowledge Area Table**



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

Knowledge Area	Application	Performance Measurement	PM 686B PPM#3 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Execute communications management plan that ensures that stakeholders are informed through project execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Update and distribute stakeholder requirements documentation and distribute as required.</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders to be documented in project management plan and updated through project execution.</li> <li>Adherence to project communication plan.</li> <li>Document stakeholder feedback and submit deliverable prior to due dates.</li> <li>Document validation requirements as described in change management plan and distribute to appropriate stakeholder committee members.</li> <li>Inform committee advisory members on changes as they occur.</li> </ul>	<ul style="list-style-type: none"> <li>PM 686B PPM#2 and 3 submitted to UAA website and distributed via email to advisory committee members.</li> <li>Change management log updated with change request to extend PPM#3 deliverable to allow project manager to regain up-to-date status on project deliverables maintaining end project date of December 8, 2014.</li> <li>Change request form and change log approved by advisor and submitted to Project Manager via email.</li> <li>PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.</li> <li>Meeting with SME Ray Schulte to review project paper.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> <li>Update Gantt chart through execution and inform project stakeholders of project WBS task progression.</li> </ul>	<ul style="list-style-type: none"> <li>Gantt chart updated to incorporate PM 6 project deliverables.</li> <li>Gantt chart and WBS updates show PM 686A and PM 686B PPM deliverables and at 95% complete which is accurate with 11/16/14 project status date.</li> <li>WBS update illustrates percentage complete for Integration 96%, Communication 97%, Scope 99%, Risk 95%, and Time Management 95%.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Integrate project charter</li> <li>Implement project management plan.</li> <li>Implement change management plan.</li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Integrate approved scope of work changes.</li> <li>Document the complete impact of change requests.</li> <li>Distribute change management plan deliverables to stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001 and PM686B-002.</li> <li>Change management log updated with Change request PM686B-001 and PM686B-002.</li> <li>Requirements traceability matrix, risk register and risk response implementation updated.</li> </ul>

**Figure 1.3 Knowledge Area Table**

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

Knowledge Area	Application	Performance Measurement	PM 686B PPM#4 Deliverables
<b>Project Communications Management</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders.</li> <li>Execute communications management plan that ensures that stakeholders are informed through project execution.</li> <li>Distribute information in timely manner to allow feedback.</li> <li>Update and distribute stakeholder requirements documentation and distribute as required.</li> </ul>	<ul style="list-style-type: none"> <li>Added stakeholders to be documented in project management plan and updated through project execution.</li> <li>Adherence to project communication plan.</li> <li>Document stakeholder feedback and submit deliverable prior to due dates.</li> <li>Document validation requirements as described in change management plan and distribute to appropriate stakeholder committee members.</li> <li>Inform committee advisory members on changes as they occur.</li> </ul>	<ul style="list-style-type: none"> <li>PM 686B PPM#4 submitted to UAA website and distributed via email to advisory committee members.</li> <li>Change request form and change log approved by advisor and submitted to Project Manager via email.</li> <li>PM 686B Student/Advisory Committee Expectations Contract approved by Committee members via email. Requires Advisor approval.</li> <li>Meeting with SME Ray Schulte to review project paper for potential BP proprietary information.</li> <li>BP Legal Counsel requested BP Operations review of Project Paper and approve prior to his review and comment. As a result, meeting requested by Project Manager with Walter Almon, Mike Spitz, and Ray Schulte. Meeting conducted to obtain comments and gain approval. Project paper updated and submitted to BP Legal.</li> <li>BP Legal Counsel reviewed and commented. Project Manager updated paper based on instruction. Project paper approved by BP Legal Counsel.</li> </ul>
<b>Project Time Management</b>	<ul style="list-style-type: none"> <li>Define and sequence activities that are realistic.</li> <li>Estimate activity resources with durations taking into consideration stakeholder's limited time availability.</li> </ul>	<ul style="list-style-type: none"> <li>Document task additions and sequence changes to Gantt chart through execution.</li> <li>Document number of times to re-baseline Gantt chart (if required).</li> <li>Update Gantt chart through execution and inform project stakeholders of project WBS task progression.</li> </ul>	<ul style="list-style-type: none"> <li>Gantt chart updated to incorporate BP Legal Counsel added tasks. Operations review/approval and project paper updates to obtain BP Legal Counsel approval.</li> <li>Gantt chart and WBS updates show PM 686A &amp; B deliverables and at 97% complete which is accurate with 11/20/14 project status date.</li> <li>WBS update illustrates percentage complete - Integration 99%, Comm. 97%, Scope 99%, Risk 95%, Time Management 95%, PMP 99%, and Oral Presentation 77%.</li> </ul>
<b>Project Integration Management</b>	<ul style="list-style-type: none"> <li>Integrate project charter</li> <li>Implement project management plan.</li> <li>Implement change management plan.</li> </ul>	<ul style="list-style-type: none"> <li>Execute project according to project management plan.</li> <li>Document scope of work change requests.</li> <li>Integrate approved scope of work changes.</li> <li>Document the complete</li> </ul>	<ul style="list-style-type: none"> <li>Change management plan implemented with development and submittal of Change Request form for PM 686B PPM #1, #2, #3 schedule revision. Change request identified as Change No. PM686B-001 and PM686B-002.</li> <li>Change management log updated with</li> </ul>



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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		<ul style="list-style-type: none"><li>• impact of change requests.</li><li>• Distribute change management plan deliverables to stakeholders.</li></ul>	<ul style="list-style-type: none"><li>• Change request PM686B-001 and PM686B-002.</li><li>• Requirements traceability matrix, risk register and risk response implementation updated.</li></ul>
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**Figure 1.4 Knowledge Area Table**

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
Project Management Plan  
Carlos Lujan, MSPM Student**

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**O. IRB Approval Documentation**

Lujan, Carlos (BP)

---

From: Dianne Toebe <no-reply@irbnet.org>  
Sent: Wednesday, April 02, 2014  
12:45 PM To: Lujan, Carlos (BP)  
Subject: IRBNet Board Action

Categories: CAUTION: External email – increased risk of phishing

Please note that University of Alaska Anchorage IRB has taken the following action on IRBNet:

Project Title: [592512-1] Development of a Prioritization Tool for BP Exploration Alaska Category C Projects  
Principal  
Investigator: Carlos Lujan, BS

Submission Type: New Project  
Date Submitted: April 1, 2014

Action: APPROVED  
Effective Date: April 2, 2014  
Review Type: Exempt Review

Should you have any questions you may contact Dianne Toebe at [afdmnt@uaa.alaska.edu](mailto:afdmnt@uaa.alaska.edu).

Thank you,  
The IRBNet Support Team

[www.irbnet.org](http://www.irbnet.org)

# Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects

## Project Management Plan

### Carlos Lujan, MSPM Student

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#### COLLABORATIVE INSTITUTIONAL TRAINING INITIATIVE (CITI) BASIC/REFRESHER COURSE IN HUMAN SUBJECTS RESEARCH CURRICULUM COMPLETION REPORT Printed on 03/27/2014

**LEARNER** Carlos Lujan (ID: 4092334)  
5717 Kenai Fjords Loop  
Anchorage  
Alaska 99502

**DEPARTMENT** MSPM

**PHONE** 907-564-5274

**EMAIL** clujan@alaska.edu

**INSTITUTION** University of Alaska Anchorage

**EXPIRATION DATE** 03/26/2017

#### UNIVERSITY OF ALASKA ANCHORAGE FACULTY, STAFF AND STUDENTS

**COURSE/STAGE:** Basic Course/1

**PASSED ON:** 03/27/2014

**REFERENCE ID:** 12680474

REQUIRED MODULES	DATE COMPLETED	SCORE
Introduction	03/27/14	No Quiz
History and Ethical Principles - SBE	03/27/14	5/5 (100%)
Defining Research with Human Subjects - SBE	03/27/14	5/5 (100%)
Basic Institutional Review Board (IRB) Regulations and Review Process	03/27/14	5/5 (100%)
Assessing Risk - SBE	03/27/14	5/5 (100%)
Informed Consent - SBE	03/27/14	5/5 (100%)
Privacy and Confidentiality - SBE	03/27/14	5/5 (100%)
Records-Based Research	03/27/14	2/2 (100%)
Genetic Research In Human Populations	03/27/14	2/2 (100%)
Research With Protected Populations - Vulnerable Subjects: An Overview	03/27/14	4/4 (100%)
Research with Prisoners - SBE	03/27/14	3/4 (75%)
Vulnerable Subjects - Research Involving Children	03/27/14	3/3 (100%)
Research in Public Elementary and Secondary Schools - SBE	03/27/14	4/4 (100%)
Vulnerable Subjects - Research Involving Pregnant Women, Human Fetuses, and Neonates	03/27/14	3/3 (100%)
International Research - SBE	03/27/14	3/3 (100%)
Internet Research - SBE	03/27/14	5/5 (100%)
Research and HIPAA Privacy Protections	03/27/14	4/5 (80%)
Conflicts of Interest in Research Involving Human Subjects	03/27/14	5/5 (100%)
University of Alaska Anchorage	03/27/14	No Quiz

For this Completion Report to be valid, the learner listed above must be affiliated with a CITI Program participating institution or be a paid Independent Learner. Falsified information and unauthorized use of the CITI Program course site is unethical, and may be considered research misconduct by your institution.

Paul Braunschweiger Ph.D.  
Professor, University of Miami  
Director Office of Research Education  
CITI Program Course Coordinator

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**P. Initial Table of Contents for Final Project Report**

1. Abstract .....	1
2. Introduction .....	1
2.1. Project Objectives .....	1
2.2. Background .....	1
3. Literature Review .....	1
3.1. Category A & B Project Objective Prioritization .....	1
4. Research and Approach to Analysis .....	1
4.1. Benchmark Project Objective Prioritization .....	1
4.2. Results .....	1
4.3. Validation .....	1
5. Results .....	1
5.1. Standard Methodology to Identify Business Objectives .....	1
5.2. Business Objectives Criteria Definition Checklist and Matrix .....	1
6. Conclusion .....	1
7. Recommendations .....	1
8. Lessons Learned .....	1

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects  
Project Management Plan  
Carlos Lujan, MSPM Student**

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**Q. PM 686A and PM 686B Capstone Project: "Go Status" for PM 686A and PM 686B**  
Lujan, Carlos (BP)

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From: LuAnn Piccard <lpiccard2@uaa.alaska.edu>  
Sent: Wednesday, April 16, 2014 3:27 PM  
To: "201401\_PM\_A686A\_Capstone Project Initiating and Planning"  
Subject: 201401\_PM\_A686A\_Capstone Project: Initiating and Planning: Go Status for PM 686A

Categories: CAUTION: External email – increased risk of phishing

Hi,

You have a "go" status for PM 686A. Please continue to refine your presentations for next week. Per the syllabus, remember that ALL presentations must be posted to BB by 8:30am on Monday April 21, regardless of when your presentation is scheduled. That makes it fair for everyone and gives me time to load all of the presentations to the class PC prior to the presentation sessions starting. The presentation schedule has been emailed to each of you and posted in the announcements area of Blackboard. Please contact our offices at 786-1924 or Meuy at [espm@uaa.alaska.edu](mailto:espm@uaa.alaska.edu) if you have any questions.

I would like to encourage all of you to attend as many of your fellow students' presentations as possible, however we also understand that some of your schedules may not permit. Please make your best effort.

PPM #4 scores will be posted on Friday 4/18 by 3:30pm. Final scores for the project management plan (submitted at PPM #4), presentation, and contribution to the learning of others scores will be posted to BB on Wed April 23.

Regards,

LuAnn, Roger, Seong Dae

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

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**Lujan, Carlos (BP)**

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From: LuAnn Piccard <lpiccard2@uaa.alaska.edu>  
Sent: Tuesday, November 25, 2014 11:23 AM  
Subject: 201403\_PM\_A686B Capstone Executing, Controlling and Closing: Go Status for PM  
68  
6B

Categories: CAUTION: External email – increased risk of phishing

Hi,

We are happy to report that you have achieved "go" status for PM 686B and should continue on with your final deliverables and presentation. We decided to provide this input prior to Wednesday to ease any concerns you might have had at this point.

Please review the draft presentation schedule posted to BB and let us know if you have any scheduling concerns.

Keep up the good work and have a great Thanksgiving. You are in the home stretch!!! Now's the time to fine tune your presentation, take a step back to appreciate all you have done and show your pride!

Remember to RSVP for the Hooding Ceremony and Commencement. The web link is on the UAA website on the commencement page. They need to have that information in advance to plan the ceremony, print out name/pronunciation cards, etc. As discussed in class you need to rent or purchase your cap/gown and hood (ORANGE for CoEng) from the Bookstore. If you haven't done that, don't delay!

Regards,

LuAnn, Roger and Seong Dae

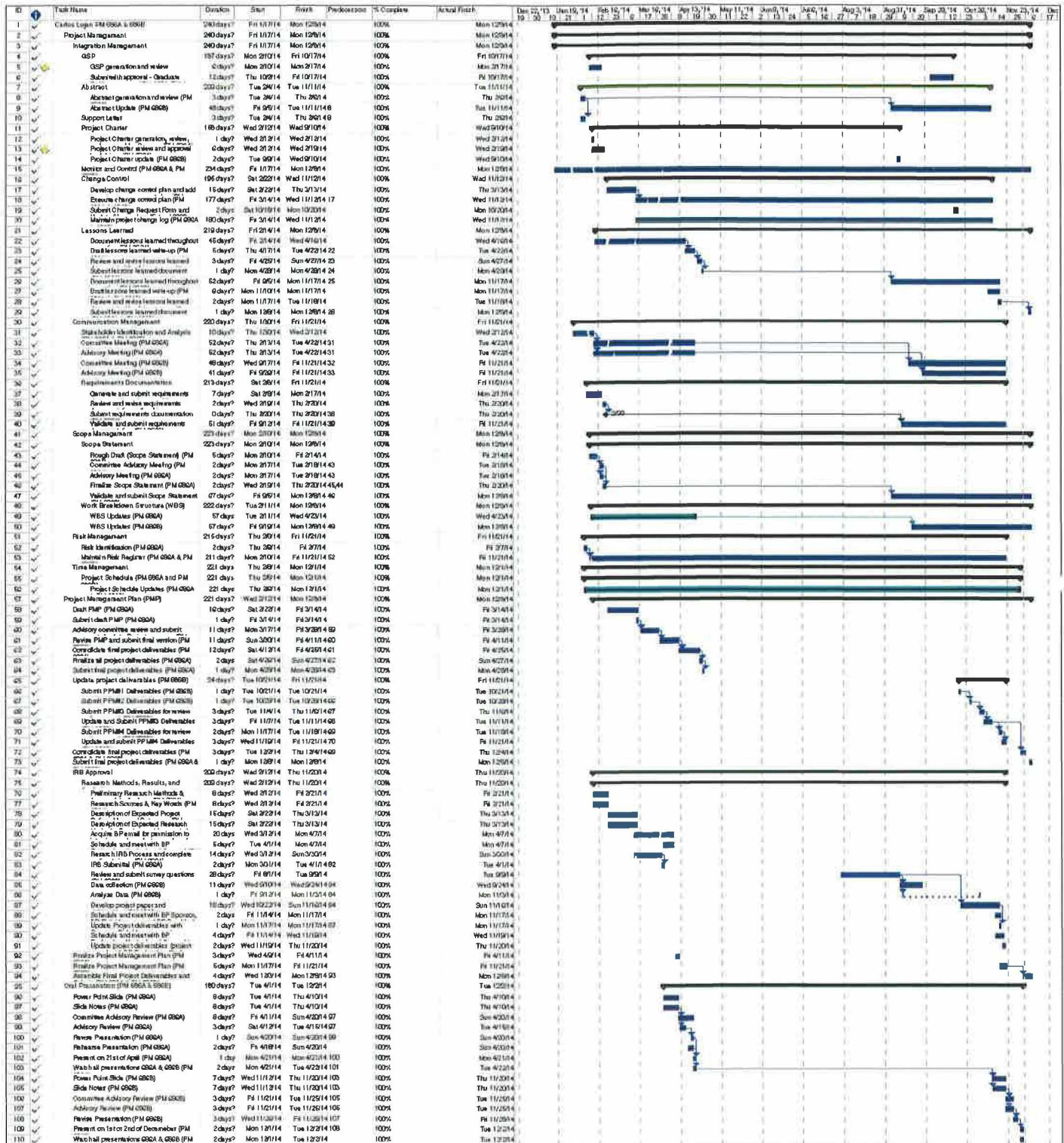


# Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects

## Project Management Plan

### Carlos Lujan, MSPM Student

#### R. Updated Project Schedule

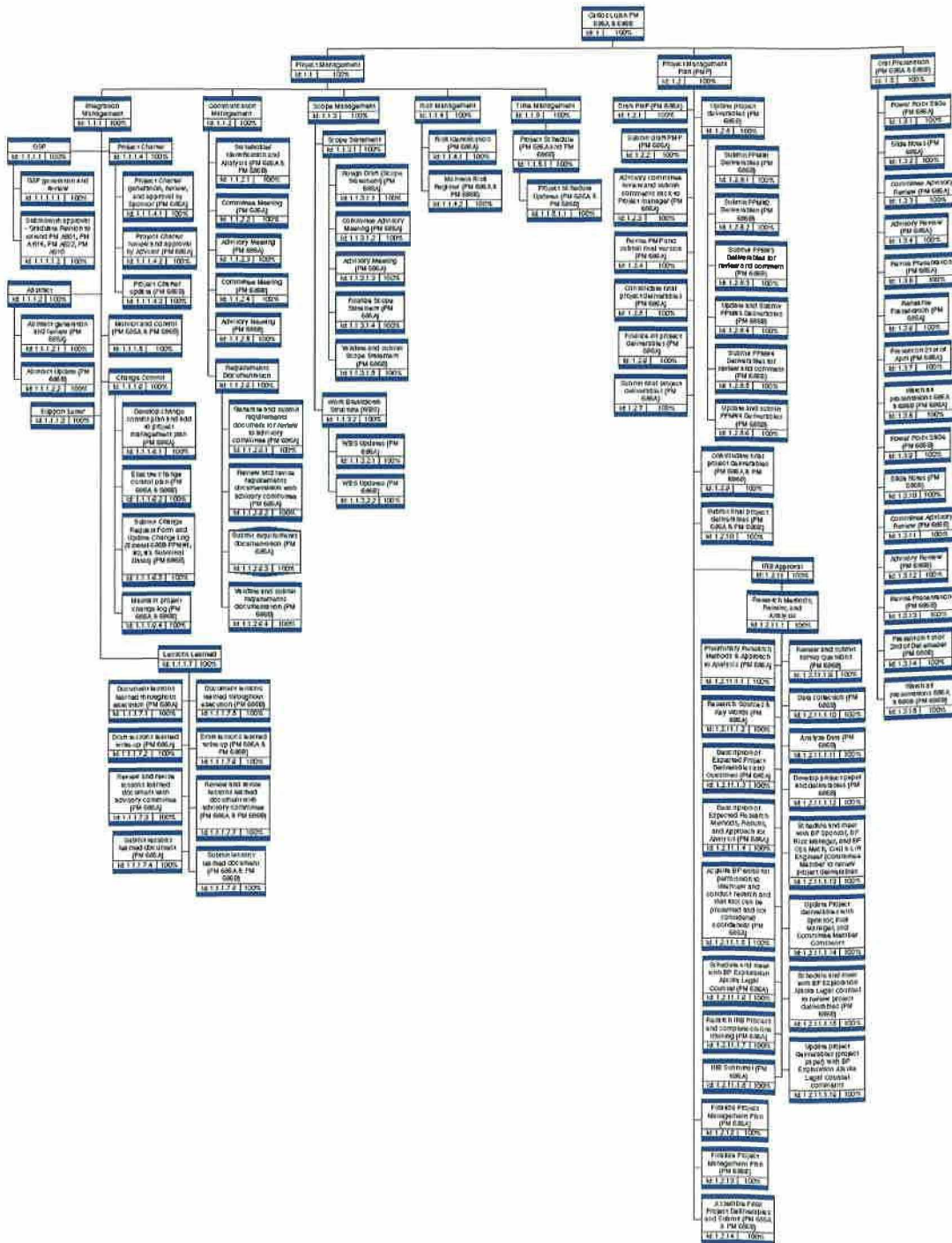


# Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects

## Project Management Plan

### Carlos Lujan, MSPM Student

## S. Updated Work Breakdown Structure



Fields		Completed Task	Completed Milestone	Completed Summary
Name				
WBS	% Complete			



# Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects

## Project Management Plan

### Carlos Lujan, MSPM Student

## T. Risk Response Implementation

Risk ID	Project Risk Overview						Mitigation Plan		Final Risk Ranking				Notes/Comments/Reference Documents/Doc	ACTION TRACKING				
	Risk Description	Initial Event/Cause	Potential Consequence	Probability	Impact	Ability to Manage	Initiative	Risk Description	Reference Documentation	Risk Level Probability	Risk Level Impact	Ability to Manage		WBS ID	Owner	Due Date	Status	Completion Date
1	Committee Advisor time availability	Committee advisor not responding to project manager with PPM comments / recommendations	Delay project deliverables Quality of project deliverables	M	H	L	Committee Advisor communication	Project Manager inform Committee Advisor of PPM deliverables expected review dates via class announcement, e-mail, phone, UAA collaboration area web site, and UAA PPM & deliverables web site.	Project Management Plan, Project Gantt Chart, WBS, Change Request Form, and Change Log	L	L	H	- Reference documentation updated and submitted in PPM#1 deliverables. - Change Request Form and Change Log submitted to Advisor for approval. 10/16/14 - Project Manager and Advisor review dates listed in Due Date section in Action Tracking.	1.2; 1.1.5.1.1; 1.1.3.2.2; 1.1.1.6.3	Project Manager	10/21/14; 10/26/14; 11/4/14; 11/7/14; 11/19/14; 11/21/14	Complete	11/19/2014
2	SMB participation	SMBs do not reply with signed consent form, SMBs do not reply to survey	Delay project deliverables	H	H	L	GPO and GCO general manager communication	Project Manager coordinate with GPO and GCO general managers to acquire support	SMB consent form	L	L	H	- Research Method and approach to Analysis Survey (3 steps) 1. Recreate and Review survey comments 2. Meet to discuss survey comments 3. Release survey to BP SMB's - Requested BP SMB comments from survey distribution, (4 of 4 SMB's replied) - Received BP proprietary information: 1. Business Profitability Training PowerPoint 2. Appraisal Best Practices (Examples, Power Point Presentations, Tools) 3. Setting Business Priorities (BP) Lessons Learned 4. Global Operations Organization (GCO) Business Case Analysis (BCA) Examples - 3 separate meetings with 2 SMB's and BP Sponsor to discuss project deliverables. All in agreement with Project Manager proposal.	1.2.11.1.1.0	Project Manager	9/24/2014	Complete	9/26/2014
3	Adaptative survey questions	SMB not able to participate with generation of survey questions	- Inadequate survey - Delay project deliverables	M	H	H	SMB communication	Project Manager generate questions with qualified SMB and review with committee advisors	Collaboration documents (emails)	L	L	H	- Collaboration documents submitted to UAA PPM 686B collaboration site		Project Manager	9/9/2014	Complete	9/9/2014
4	Critical Resources review / recommendations	Committee team not responding to project manager with PPM comments / recommendations	Quality of project deliverables	M	H	L	Committee and SMB communication	Project Manager review project schedule with committee team to acquire approval and generate Student/Advisory Committee Contract	Project Management Plan, Project Gantt Chart, WBS, Change Request Form, and Change Log	L	L	H	- Reference documentation updated and submitted in PPM#1 deliverables via UAA PPM website and email. - Committee team review dates listed in Gantt Chart	1.2; 1.1.5.1.1; 1.1.3.2.2	Project Manager	10/21/14; 10/26/14; 11/4/14; 11/7/14; 11/19/14; 11/21/14	Complete	12/1/2014
5	Acquire Project Management Software	Project Manager not able to generate or update project deliverables	Delay project deliverables	L	H	M	AV Communication	Project Manager download demo versions from websites and UAA Faculty Staff	Phone call	L	L	H	- WBS Chart Pro loaded on Project Manager computer 10/20/14		Project Manager	10/20/2014	Complete	10/20/2014
6	BP Exploration Alaska Legal Counsel support	BP Exploration Legal Counsel does not approve with Project Manager project deliverables for PPM#686A and PPM#686B classes	Delay project deliverables	M	H	L	BP Exploration Alaska Legal Counsel communication	Project Manager verify project deliverables are not proprietary to BP Exploration Alaska. Set up meeting to discuss project deliverables prior to PPM#686A class completion and if PPM#686B project completion.	Project Management Plan, Project Gantt Chart, WBS, Collaboration documents (emails)	L	L	H	- BP Legal Counsel approval to proceed with PPM#686A deliverables submissions 4/1/14 - Schedule meeting with BP Legal Counsel to review and approve PPM#686B project deliverables	1.2.11.1.1.3	Project Manager	11/19/2014	Complete	11/19/2014
7	Project Manager time availability to develop, review, modify, and submit project deliverables	Project Manager behind in PPM submittals	Delay project deliverables	H	H	M	Advisor and Committee team communication	- Project Manager re-baseline project success schedule which includes Project GOV completion with deliverable dates as specified in PPM#686B collaboration. - Project Manager submit change request form and update change log. - Project Manager acquire Advisor approval to proceed with PPM#686B class.	Project Management Plan, Project Gantt Chart, WBS, Change Request Form, and Change Log	M	H	H	- Project Manager unable to complete PPM#686B (PPM#1), PPM#2, and PPM#3 project deliverables on time due to job responsibilities. - Project Manager has resubmitted Change Request Form with Change Log to request approval to submit PPM#4, PPM#5, and PPM#67 deliverables as specified in Project Management Plan and Gantt Chart. - Requested PPM#4, PPM#5, and PPM#67 review and submittal dates are listed in Due Date section in Action Tracking.	1.2; 1.1.5.1.1; 1.1.3.2.2; 1.1.1.6.3	Project Manager	10/21/14; 10/26/14; 11/4/14; 11/7/14; 11/19/14; 11/21/14	Complete	10/23/2014
8	Project Manager submittal of Quality Paper in PPM#686B (PPM#3)	Advisor request to add PPM#686B Paper to Project Risk Register	Delay project deliverables	M	H	H	Committee Advisory review and comment	- Project Manager add Advisory Committee and BP Stakeholder review task to Gantt Chart. - Project Manager submit preliminary paper to Advisory Committee and BP Stakeholder. - Project Manager review paper with Advisory Committee and BP Stakeholders. - Project Manager review and update Project Paper and submit to BP Legal Counsel. - Project Manager review and update Paper with BP Legal Counsel comments	Project Management Plan, Project Gantt Chart, and WBS	L	L	H	- Project Management Plan, Risk Register, Risk Response Implementation, Gantt Chart, and WBS updated for PPM#62 distribution	1.2; 1.1.5.1.1; 1.1.3.2.2	Project Manager	11/21/2014	Complete	11/21/2014

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**


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**U. Change Request Forms and Change Management Log**

Element	Description								
Date	10/18/14								
CR#	PM686B-001								
Title	PM 686B PPM #1, #2, #3 Deliverable Dates Extended								
Description	<p>Project Manager requests 686B PPM#1, #2, #3 deliverables be extended to dates as listed below:</p> <table border="0"> <thead> <tr> <th><u>Dates</u></th><th><u>Deliverables</u></th></tr> </thead> <tbody> <tr> <td>10/21/14</td><td> PPM#1:  Change Control Process  Project Progress Method and Status  Updated Project Management Plan  Risk Response Implementation  Project Deliverables Status Update  Data Collection/Research Update  Update on 3-4 Knowledge Areas  Final GSP  Updates Student / Advisory Committee Expectations </td></tr> <tr> <td>10/28/14:</td><td> PPM#2:  Updated Abstract  Updated Table of Contents  Updated Research Sources and Key Words  Validated Research Analysis  Project Progress Status  Update on 3-4 Knowledge Areas  Updated Project Management Plan  Risk Response Implementation  Project Deliverables Status Update  Signed Student/Advisory Committee Contract </td></tr> <tr> <td>11/11/14:</td><td> PPM#3:  Draft Paper  Revised Abstract  Research Results and Analysis  Preliminary Conclusions and Project Deliverables  Update on 3-4 Knowledge Areas  2nd Go/No-Go Decision (Checkpoint 11/12/14) </td></tr> </tbody> </table> <p>Impact:</p> <ul style="list-style-type: none"> <li>• PPM#1 deliverables submitted 22 working days behind course schedule</li> <li>• PPM#2 deliverables submitted 12 working days behind schedule</li> <li>• PPM#3 deliverables submitted 2 working days behind schedule</li> </ul> <p>Benefits:</p> <ul style="list-style-type: none"> <li>• Project Manager is able to gain traction with PM686B PPM #1, #2, and #3</li> </ul>	<u>Dates</u>	<u>Deliverables</u>	10/21/14	PPM#1: Change Control Process Project Progress Method and Status Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Data Collection/Research Update Update on 3-4 Knowledge Areas Final GSP Updates Student / Advisory Committee Expectations	10/28/14:	PPM#2: Updated Abstract Updated Table of Contents Updated Research Sources and Key Words Validated Research Analysis Project Progress Status Update on 3-4 Knowledge Areas Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Signed Student/Advisory Committee Contract	11/11/14:	PPM#3: Draft Paper Revised Abstract Research Results and Analysis Preliminary Conclusions and Project Deliverables Update on 3-4 Knowledge Areas 2nd Go/No-Go Decision (Checkpoint 11/12/14)
<u>Dates</u>	<u>Deliverables</u>								
10/21/14	PPM#1: Change Control Process Project Progress Method and Status Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Data Collection/Research Update Update on 3-4 Knowledge Areas Final GSP Updates Student / Advisory Committee Expectations								
10/28/14:	PPM#2: Updated Abstract Updated Table of Contents Updated Research Sources and Key Words Validated Research Analysis Project Progress Status Update on 3-4 Knowledge Areas Updated Project Management Plan Risk Response Implementation Project Deliverables Status Update Signed Student/Advisory Committee Contract								
11/11/14:	PPM#3: Draft Paper Revised Abstract Research Results and Analysis Preliminary Conclusions and Project Deliverables Update on 3-4 Knowledge Areas 2nd Go/No-Go Decision (Checkpoint 11/12/14)								

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

	deliverables and complete project with-in Project Management Plan milestone dates.
Submitter	Carlos Lujan
Phone	907-564-5274
E-Mail	Carlos.lujan@bp.com
Priority	High

CHANGE CONTROL BOARD - DECISION			
<b>Decision</b>	<input type="checkbox"/> Approved	<input type="checkbox"/> Approved w/Conditions	<input type="checkbox"/> Rejected <input type="checkbox"/> More Info
<b>Decision Date</b>			
<b>Decision Explanation</b>			
<b>Stakeholder</b>	Signature (Electronic Acceptable)	Date	
<b>Project Sponsor</b>	N/A		
<b>Project Advisor</b>		10/23/2014	
<b>Committee Member</b>	N/A		
<b>Committee Member</b>	N/A		
<b>Project Manager</b>	Carlos Lujan	10/18/14	

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

Element	Description														
Date	11/9/14														
CR#	PM686B-002														
Title	PM 686B PPM #3 Deliverable Date Extended														
Description	<p>Previous CR PM686B-001 extended PPM#3 to 11/11/14. Project Manager has had shoulder surgery 10/30/14 and lost valuable time recuperating. Project Manager requests 686B PPM#3 deliverables be extended to date as listed below:</p> <table> <tr> <td><u>Dates</u></td><td><u>Deliverables</u></td></tr> <tr> <td>11/14/14:</td><td>PPM#3:</td></tr> <tr> <td></td><td>Draft Paper</td></tr> <tr> <td></td><td>Revised Abstract</td></tr> <tr> <td></td><td>Research Results and Analysis</td></tr> <tr> <td></td><td>Preliminary Conclusions and Project Deliverables</td></tr> <tr> <td></td><td>Update on 3-4 Knowledge Areas</td></tr> </table> <p>Impact:</p> <ul style="list-style-type: none"> <li>PPM#3 deliverables submitted 5 working days behind schedule</li> </ul> <p>Benefits:</p> <ul style="list-style-type: none"> <li>Project Manager is able to gain traction with PM686B #3 deliverables and complete project with-in Project Management Plan milestone dates.</li> </ul>	<u>Dates</u>	<u>Deliverables</u>	11/14/14:	PPM#3:		Draft Paper		Revised Abstract		Research Results and Analysis		Preliminary Conclusions and Project Deliverables		Update on 3-4 Knowledge Areas
<u>Dates</u>	<u>Deliverables</u>														
11/14/14:	PPM#3:														
	Draft Paper														
	Revised Abstract														
	Research Results and Analysis														
	Preliminary Conclusions and Project Deliverables														
	Update on 3-4 Knowledge Areas														
Submitter	Carlos Lujan														
Phone	907-564-5274														
E-Mail	Carlos.lujan@bp.com														
Priority	High														

CHANGE CONTROL BOARD - DECISION				
Decision	<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Approved w/Conditions	<input type="checkbox"/> Rejected	<input type="checkbox"/> More Info
Decision Date				
Decision Explanation				
Stakeholder	Signature (Electronic Acceptable)		Date	
Project Sponsor	N/A			
Project Advisor	Advisor Approval via Email		11/12/14	
Committee Member	N/A			
Committee Member	N/A			
Project Manager	Carlos Lujan		11/09/14	



**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Management Plan**  
**Carlos Lujan, MSPM Student**

Change Log							
<b>Project:</b> Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects						<b>Date:</b> 11/12/14	
Change No.	Change Type	Description of Change	Requestor	Date Submitted	Date Approved	Status	Comments
PM686B-001	Schedule	PM 686B PPM#1, #2, #3 Deliverable Dates Extended	Carlos Lujan	10/18/14	10/23/14	Approved	Update risk register
PM686B-002	Schedule	PM 686B PPM#3 Deliverable Date Extended	Carlos Lujan	11/9/14	11/12/14	Approved	Keep making progress





BP EXPLORATION (ALASKA) INC.

# Project Charter

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Development of a Prioritization Tool for BP  
Exploration (Alaska) Inc. Category C Projects

**Prepared by: Carlos Lujan**

Also located in Project Management Plan

**Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects**  
**Project Charter**  
**Carlos Lujan, MSPM Student**

**Project Charter**

**PROJECT INFORMATION**

		<b>DATE PREPARED:</b>	2/2/2014
<b>PROJECT NAME:</b>	Development of a Prioritization Tool for BP Exploration (Alaska) Inc. Category C Projects	<b>DATE MODIFIED:</b>	12/4/2014
<b>PROJECT SPONSOR:</b>	Michael Spitz	<b>PHONE:</b>	564-4926
<b>PROJECT MANAGER:</b>	Carlos Lujan	<b>PHONE:</b>	564-5274
<b>SCHEDULED START DATE:</b>	February 1, 2014	<b>SCHEDULED COMPLETION DATE:</b>	December 08, 2014
<b>ATTACHMENTS</b>	686A and 686B Syllabi		

**PROJECT OVERVIEW**

The production of oil and gas in the major North Slope fields in Alaska is on the decline as it is in any major oilfield of this age. Capital resources must therefore be utilized with the greatest efficiency.

BP Exploration (Alaska) Inc. (BPXA) Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category (Cat) "C" projects (range from \$250,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process.

One of BPXA's strategic objectives is to improve the utilization of Cat C projects capital resources. The project will develop and clarify business objectives ensuring only Cat C projects with strong business drivers will be funded, unless the project is an integrity or health and safety project. This approach will ensure that fit-for-service improvements are selected for execution.



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The project provides a step-by-step BPXA Category (Cat) C project assessment tool to define business objectives, quantifies the business drivers, and provides a tool to use for the subsequent prioritization. The project was developed using an analysis of existing Cat A and B business objectives and prioritization literature provided background information on current strategies. In addition, analysis of survey questionnaire and follow-up interviews with Subject Matter Experts (SMEs) from BPXA Cat A and B Global Projects Organization (GPO) provided further inputs for development of the prioritizing process. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries were identified to be examined. This project includes research, development of business objectives criteria definition, design of analytical hierarchical process matrix, and documentation to logically apply a step-by-step tool to identify and quantify business objectives to assist with BPXA Cat C project prioritization.

The project is phased to follow University of Alaska Anchorage (UAA) Master of Science in Project Management (MSPM) Capstone class durations as listed:

- PM 686A Initiating and Planning (January 17, 2014 thru April 28, 2014)
- PM 686B Executing, Controlling, and Closing (September 05, 2014 thru December 08, 2014)

Contents of each class are listed:

PM 686A Initiating and Planning

- Stakeholder Identification and Analysis
- Project Charter
- Preliminary project schedule/gantt chart with updates
- Preliminary Work Breakdown Structure (WBS) with updates
- 200 word Project Abstract with updates
- Letter(s) of support from project sponsor
- Preliminary Graduate Studies Plan (GSP) (including written agreement from advisor/committee members)
- Selection of 3-4 Knowledge Areas used during project to demonstrate mastery, how they will be applied to the project and how the performance will be measured. (with update)
- Project scope statement
- Requirements documentation (stakeholder requirements)
- Tables of contents for PM Plan and Final Project Report
- Research Sources and Key Words
- Preliminary research methods and approach to analysis (e.g., surveys, interview questions, statistical analysis, etc.)
- Description of expected research methods, results and approach for analysis
- Signed Student/Advisory Committee "contract"
- Written draft of project management plan with updates
- Description of expected project deliverables and outcomes (with updates)
- Advisor- approved research instruments and analysis methodology. Approval must be documented in email.

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- University of Alaska Anchorage (UAA) IRB submittal
- Professional draft presentation of project objectives, charter, project management plan description of project deliverables
- Presentation of approved Project Plan. PowerPoint/other media. (with updates)
- Oral Presentation
- Separate 2-3 page summary narrative of project lessons learned.
- Separate 2-3 page descriptive narrative of how focused knowledge areas were applied and measured on project.

PM 686B Executing, Controlling, Closing

- Change Control Process, Project progress method and status (e.g. EVM, other)
- Project Management Plan updates (using change control process)
- Updates on requirements traceability matrix
- Updates on WBS
- Updates on schedule/gantt chart
- Updates on risk register
- Risk response implementation
- Project deliverables status update
- Data collection/research updates (should have all raw data at this point)
- 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery (with updates)
- Final signed GSP directly to PM Department Staff
- Signed Student/Advisory Committee "contract"
- Updates on abstract
- Updates on table of contents
- Updates on research sources and key words
- Research results with validated research analysis (needs advisor approval)
- Preliminary conclusions and project deliverables
- Draft presentation
- Complete and properly formatted project report and final project deliverables (with updates)
- Oral Presentation
- Final report, to include two hard copies of complete report, appendices, mandatory deliverables and PowerPoint presentation. One copy will be placed in tabbed binder provided by the Department for MSPM library with a CD of complete copy of electronic files.
- 2-3 page summary narrative of project lessons learned included in separate section of project binder.
- Narrative on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery. Performance measured and lessons learned.

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<b>BP DIVISIONS/SYSTEMS IMPACTED</b>
Operations, Activity Planning, Backbone, Discipline Capability, Engineering Services, Logistics and Infrastructure, Reliability and Maintenance, Finance, Data Management

<b>PROJECT OBJECTIVES</b>	
<b>OBJECTIVE</b>	<b>CRITERIA FOR EVALUATION</b>
Define business objectives for Cat C projects to assist with project evaluation criteria.	Acceptance by PMT TL.
Enhance prioritization method for BP Cat C projects with results from business objectives evaluation to assign and execute projects without increased cost due to deferment.	Project deferment cost reductions.
Support BP PMT execution handbook	Meets requirements of BP global Cat A and B business objectives standards.

<b>PROJECT SCOPE</b>	
<b>IN SCOPE</b>	<b>OUT OF SCOPE</b>
Analyze BP Cat A and B business objectives criteria	Suggestions to enhance Cat A and B business objective evaluation methodology
Analyze current prioritization for BP Cat C projects	Analyze prioritization methods outside oil and gas industry
Define interview questions for SMEs	
Conduct interviews	Conduct interviews outside oil and gas industry
Compile and evaluate interview results	
Develop a standard methodology to identify business objectives for Cat C projects	
Design a business objectives criteria definition checklist and matrix	
Assemble manual which illustrates Cat C business objectives evaluation tool	Implementation of Cat C business objectives evaluation tool

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MAJOR MILESTONES	
<b>PM 686A Initiating and Planning (January 17, 2014 thru April 28, 2014)</b>	
Dates	
1/17/14:	Project Start
2/6/14:	Project Abstract Preliminary Project Schedule
2/21/14:	Project Charter Preliminary Research Methods and Approach
3/14/14:	Project Management Plan draft Description of Expected Research Methods, Results, and Approach for Analysis
3/28/14:	UAA IRB Submittal
4/11/14:	Advisor-Approved Research Instruments and Analysis Methodology Professional draft Presentation of Project Final Project Management Plan 1 <sup>st</sup> Go/No-Go Decision
4/21/14:	Final Presentation
4/28/14:	Final Project Management Plan Refined Project Research, Deliverables, Outcomes Final Presentation Slides Lessons Learned Narrative Knowledge Areas Narrative

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MAJOR MILESTONES	
<b>PM 686B Executing, Controlling, and Closing (September 05, 2014 thru December 08, 2014)</b>	
Dates:	
10/21/14	Change Control Process Updated Project Management Plan Risk Response Implementation Data Collection/Research Update Final GSP
10/28/14	Validated Research Analysis Signed Student/Advisory Committee Contract
11/11/14	Draft Paper Preliminary Conclusions and Project Deliverables 2 <sup>nd</sup> Go/No-Go Decision
11/21/14	Draft Presentation Final Project Report Final Project Deliverables Final Go/No-Go Decision
12/1/14	Final Oral Presentation
12/8/14	Final Report Lessons Learned Narrative Knowledge Areas Narrative

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**ASSUMPTIONS**

- Project Manager has access to necessary software programs (Microsoft Office, WBS Chart Pro, Blackboard, Backbone).
- Advisors will review and give constructive feedback on draft project deliverables.
- This project assumes the SMEs are receptive and willing to participate in the interview process.
- Project Stakeholders have adequate time to review and approve project deliverables.

**CONSTRAINTS**

- Project Progress Milestone (PPM) dates as specified in 686A and 686B syllabi (see attached)
- Advisor and committee members time availability

**PROJECT RISKS**

<b>RISK</b>	<b>IMPACT ON PROJECT</b>	<b>MITIGATION STRATEGY</b>	<b>CRITICALITY</b>	<b>PROBABILITY</b>
1. Committee Advisor time availability	<ul style="list-style-type: none"> <li>• Delay project deliverables</li> <li>• Quality of project deliverables</li> </ul>	Inform Committee Advisor of PMP deliverables expected review dates via class announcement, e-mail, phone, UAA collaboration area web site, and UAA PPM & deliverables web site	<b>High</b>	50%
2. SME participation	Delay project deliverables	Coordinate with GPO and GOO general managers to acquire support	<b>High</b>	10%
3. Adequate survey questions	<ul style="list-style-type: none"> <li>• Inadequate survey</li> <li>• Delay project deliverables</li> </ul>	<ul style="list-style-type: none"> <li>• Generate questions with qualified SME</li> <li>• Coordinate with committee advisors</li> </ul>	<b>Medium</b>	30%



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4. Critical Resources review / recommendations	Quality of project deliverables	<ul style="list-style-type: none"> <li>Review project schedule with committee team to acquire approval</li> <li>Generate Student/Advisory Committee Contract</li> </ul>	<b>Medium</b>	30%
5. Acquire Project Management Software	Delay project deliverables	Download demo versions from websites and UAA Faculty Staff	<b>High</b>	10%
6. BP Exploration Alaska Legal Support	Delay project deliverables	<ul style="list-style-type: none"> <li>Verify project deliverables are not proprietary to BP Exploration Alaska</li> <li>Set up meeting to discuss project deliverables prior to PM686A class completion and at PM686B project conclusion</li> </ul>	<b>High</b>	30%
7. Project Manager time availability to develop, review, modify, and submit project deliverables	Can cause project delays.	<ul style="list-style-type: none"> <li>Re-baseline project execution schedule which enables Project SOW completion with deliverable dates as specified in PM686B syllabus.</li> <li>Submit change request form and update change log.</li> <li>Acquire Advisor approval to proceed with PM 686B class.</li> </ul>	<b>High</b>	70%

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8. Submittal of Quality Paper in PM 686B PPM#3	Delay project deliverables	<ul style="list-style-type: none"> <li>• Add Advisory Committee and BP Stakeholder review task to Gantt Chart</li> <li>• Submit preliminary paper to Advisory Committee and BP Stakeholder</li> <li>• Review paper with Advisory Committee and BP Stakeholders</li> <li>• Revise and update Project Paper and submit to BP Legal Counsel</li> <li>• Revise and update Paper with BP Legal Counsel comments</li> </ul>	<b>High</b>	20%
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KEY STAKEHOLDERS		
	<b>PROJECT SPONSORS</b> (SEE ROLES & RESPONSIBILITIES BELOW)	
	Michael Spitz PMT FEL TL	
	<b>PROJECT MANAGEMENT</b> (SEE ROLES & RESPONSIBILITIES BELOW)	
	Carlos Lujan PMT PL	
CORE TEAM (TECHNICAL) (SEE ROLES & RESPONSIBILITIES BELOW)		
LuAnn Piccard Project Advisor	Walter Almon Committee Member	William Thompson Committee Member

**Development of a Prioritization Tool for BP Exploration Alaska Category C Projects**  
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<b>ROLES &amp; RESPONSIBILITIES</b>		
<b>ROLES</b>	<b>RESPONSIBILITIES</b>	<b>CONTACT PERSON</b>
<b>PROJECT SPONSOR</b>	<ul style="list-style-type: none"> <li>• Authorize &amp; approve project</li> <li>• Approve project deliverables</li> <li>• Authorize project resources</li> <li>• Resolve issues</li> </ul>	Michael Spitz
<b>BP EXPLORATION ALASKA LEGAL ADVISOR</b>	<ul style="list-style-type: none"> <li>• Approve project deliverables</li> </ul>	Randal Buckendorf
<b>PROJECT MANAGER</b>	<ul style="list-style-type: none"> <li>• Coordinate team activities</li> <li>• Project planning</li> <li>• Monitor project progress</li> <li>• Resolve issues</li> <li>• Report project progress to the Project Sponsor.</li> <li>• Communicate issues to the Project Sponsors for resolution</li> </ul>	Carlos Lujan
<b>CORE TEAM (TECHNICAL)</b>	<ul style="list-style-type: none"> <li>• Serve as technical experts and share knowledge</li> <li>• Participate in team meetings &amp; discussions</li> <li>• Learn from other technical experts on the team to gain an understanding of the system</li> <li>• Apply technical expertise and judgment in the development of &amp; completion of project deliverables</li> <li>• Resolve Issues</li> </ul>	SMEs  LuAnn Piccard Walter Almon William Thompson

SIGN-OFF	
<b>PROJECT SPONSOR:</b> <u>Michael Spitz</u>	<b>DATE:</b> <u>2/12/14</u>
<b>PROJECT MANAGER:</b> <u>Carlos Lujan</u>	<b>DATE:</b> <u>2/12/14</u>
<b>PROJECT ADVISOR:</b> <u>Walter Almon</u>	<b>DATE:</b> <u>2/28/14</u>

# PM 686A: Project Management Capstone Project

## Initiating and Planning

Spring 2014– UAA Master of Science in Project Management (MSPM)

[pm@uaa.alaska.edu](mailto:pm@uaa.alaska.edu) (907) 786-1924

Friday 3:30-5:30pm, UC Room 155C

### Instructors:

LuAnn Piccard	<a href="mailto:Lpiccard@uaa.alaska.edu">Lpiccard@uaa.alaska.edu</a>	(907) 786-1917
Dr. Seong Dae Kim	<a href="mailto:sdkim2@uaa.alaska.edu">sdkim2@uaa.alaska.edu</a>	(907) 786-1922
Roger Hull	<a href="mailto:rkhull@uaa.alaska.edu">rkhull@uaa.alaska.edu</a>	(907) 786-1923

### Administrative Support:

Meuy Saechao	<a href="mailto:msaechao2@uaa.alaska.edu">msaechao2@uaa.alaska.edu</a>	(907) 786-1924
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### AV Supervisor:

Andrew Tibor	<a href="mailto:altibor@uaa.alaska.edu">altibor@uaa.alaska.edu</a>	(907) 786-1884 Cell: (907) 350-7546
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### AV Booth

<a href="mailto:pmav@uaa.alaska.edu">pmav@uaa.alaska.edu</a>	(907) 786-1865
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### PM Website:

<a href="http://www.uaa.alaska.edu/pm">www.uaa.alaska.edu/pm</a>
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### Course Description (PM 686A: First 3 credit segment of the 2 semester sequence):

Individual study: initiating and planning, preliminary research/needs identification and analysis, development of project preliminary outcomes, preparation of approved project management plan, and presentation of plan. The project may be on a topic of the student's choosing, and may be either a significant contribution to the project management body of knowledge, or a research project that demonstrates an advanced level of understanding of applied project management principles. The project will incorporate original research, the application of appropriate analysis tools and methods, and logically developed conclusions with regard to a research hypothesis or solutions to a defined problem related to project management opportunities and challenges. The project plan, scope and execution must be supported by the faculty advisor, committee members and student peers.

### Textbooks:

**A Guide to the Project Management Body of Knowledge (PMBOK®Guide)** – 5<sup>th</sup> Edition (2013), Project Management Institute (PMI), ISBN 978-935589-67-9

<http://marketplace.pmi.org/Pages/ProductDetail.aspx?GMProduct=00101388701>

### Learning Objectives and Assessment:

- Knowledge of and demonstrated mastery of project management principles and practices used in conjunction with completion of student's research project and the development of project deliverables and results. It is expected that the project will include demonstrated understanding and application of several project management knowledge areas. The requirement to include multiple knowledge areas should be considered in the design of the project.
- Assessment of the overall project will be based on the quality, timeliness and completeness of Project Progress Milestone (PPM) deliverables, ability to select or design an appropriate project, demonstration of the skill with establishing relevant, measureable objectives, the ability to scope and deliver project results that achieve stated objectives, and ability to successfully manage the project using the PMI PMBOK Process Groups and relevant elements of the ten Knowledge Areas.



- Research and project results should significantly contribute to and expand the diverse project management body of knowledge. The selected project must be non-trivial, must proceed from a valid set of hypotheses, and should not simply be reflective of an existing body of research or open literature.
- Research-oriented projects require demonstration of proficiency in the selection and use of appropriate research methods and analysis tools. The project execution and conclusions must demonstrate a clear, logical linkage from observations through analysis to conclusions with well-articulated understanding of concepts like statistical significance, level of confidence, margin of error, and population sampling. Research project analysis must lead to conclusive recommendations and unique, relevant deliverables.
- Product-oriented projects must demonstrate proficiency in the identification, analysis and understanding of user and stakeholder needs and requirements for the product of the project (e.g. templates, tools, results, deliverables, etc.) and the ability to translate these needs into project outcomes that clearly and measurably address and meet these needs and established acceptance criteria with demonstrated customer satisfaction
- Clear and compelling summary documentation, a final approved project management plan for defined scope including relevant project management processes and knowledge areas, change, risk, stakeholder management plans, and a persuasive oral defense. The quality of interim documentation the final written project management plan, and other documentation and deliverables must meet fundamental standards of usage, format, terminology, grammar, and structure at a professional level sufficient for review and approval.
- Establish clear, complete, and approved project baseline prior to project execution in sequential semester.

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## Measures of PM 686A Course Elements and Expectations:

### **PM 686A Project Progress Milestone Deliverables (34 pts)**

- All status reports and material required by the original syllabus are posted to dated folders in Blackboard designated by the *due* date. Incomplete, poor quality or late postings will result in point reductions for this element of the course grade. Include advisor and committee members' comments, as appropriate.
- There will be four PPM scores during the semester. Each PPM score will be assigned based on the material posted by the PPM due date. The PPM scores will be based on four criteria: On-time posting, Effective Stakeholder Management, Completeness of Deliverables, and Quality of Deliverables. Scores for each of these elements will be graduated differently for each of the PPM milestones (PPM1: 4 points, PPM2: 8 points, PPM3: 10 points, and PPM4: 12 points, for a semester total of 34 possible points). The allocation of points for each of the four criteria for each of the PPMs is noted in the syllabus summary.
- PPM's are cumulative. The scores for any PPM are based on the defined deliverables for that and all previous PPM's. The purpose of this approach is to ensure that deficiencies or omissions in prior PPM deliverable sets are properly corrected well prior to the completion of the current semester. Failure to submit the required deliverables by the posted deadline for any PPM may result in a score of zero points for that PPM. Late deliverables must be submitted by the posted deadline for the subsequent PPM in order for any points to be awarded for the subsequent PPM, even if the subsequent PPM deliverables are posted on time. Delayed submission of one or more specified deliverables for a PPM may be successfully negotiated in advance of the due date with the Primary Advisor and must be treated as a formal change to the project schedule.
- A summary of each PPM score will be posted in the Grade Center section of Blackboard.
- Unless otherwise agreed with the student's primary advisor, PPM scores for students completing PM 686A under DF status will be evaluated based on on-time/complete postings of PPM deliverables ***per the current semester syllabus designated in the student's associated DF Contract. Students completing under DF status must meet with their primary advisor at or before the beginning of the semester to clarify expectations for course completion, and to formally complete the current term's Departmental DF Contract under which they will proceed.***
- Progress performance deliverables must demonstrate mastery of PM principles, practices, tools, and methodologies learned throughout the program curriculum.
- The individual checkpoint scores will be assigned and entered into Blackboard by the instructor of record after reviewing the quality and completeness of the deliverables as specified in the syllabus with feedback from the student's advisor and committee.

**PM Knowledge Area Focus and Application (4 pts)**

- Each student will select 3–4 project management knowledge areas that will be applied during the planning and execution of the project. These areas will be selected based on students' interest in gaining more in depth expertise in that area and/or where the application of that topic will significantly enhance project outcomes.
- For each knowledge area selected, students will self-determine how progress and performance will be measured.
- At each PPM checkpoint, students will demonstrate how they are utilizing and the project is benefitting from the concepts and tools that were selected and performance against the student-selected measures.
- A total possible 1 point will be awarded at each PPM based on instructors' evaluations of the student's application of the selected areas and performance against measures.

**PM 686A Oral Presentation (20 pts)**

- Presentation is well organized, complete and well-presented within time constraints.
- Material presented represents a complete summary of the project's objectives, charter, and project management plan in clear, concise and insightful manner that demonstrates student's understanding of the elements successful project initiation and planning.
- Material includes description of research method and analysis approach (must have advisor/committee approval before PPM2 completion). To the extent possible, students should present any preliminary research, analysis or outcomes.
- Material includes refined description of expected project deliverables and outcomes.
- Questions and comments are addressed completely and thoroughly and demonstrate student's deeper understanding of subject material.
- Students should invite their project sponsor and are also encouraged to invite other project stakeholders (employers, friends, family, colleagues, etc.) to the oral presentation. Students' advisors and committee members are also expected to attend.
- The final score for this item will be based on scores provided by the student's advisor and committee members. Evaluation forms completed during the presentation are considered internal documents and copies will not be provided to students. (See attached presentation evaluation).

**PM 686A Project Management Plan (36 pts)**

- A completed and approved Project Charter
- Complete Project Plan including all subsidiary plans with final content for each subsidiary plan that establishes a clear baseline from which to execute the project in PM 686B and against which to measure progress and perform integrated change control.
- The format of this document should be at a professional standard and be formatted for downloading and printing using commonly available applications. If in doubt, check ahead.
- Refined description of project deliverables, outcomes, and expectations. To the extent possible, provide examples of research results or "prototypes" of anticipated deliverables (e.g. templates, tools, etc.)
- Written document is well organized, well written (grammar, vocabulary, spelling, etc.) and neatly formatted within an approved Project Management Plan template. (WE ARE SERIOUS. DO NOT UNDERESTIMATE THE IMPORTANCE OF THIS. IF YOU STRUGGLE, FIND AN EDITOR OR GET PEER SUPPORT.)
- **IRB approval for research approach and methods**
- **The version of the PM Plan submitted at PPM 4 will be used to determine the final score for this deliverable.**
- Copy of Oral Presentation PowerPoint slides.
- All documents should be integrated into a single, indexed, electronic document and posted electronically to Blackboard in a single zip file in the designated Blackboard folder.
- Submit one hard copy with a CD to ESPM Department Staff



**PM 686A Leadership and Contribution to Learning of Others (6 pts)**

- Six points will be awarded for effective stakeholder management and communication (working effectively with project stakeholders, advisor, and committee), and course leadership and contribution to the learning of other students in PM 686A. These points are not solely awarded based on attendance at class.
- This score will be determined by the members of the full-time faculty team with inputs from the students' committee members.

**Selection of Student's Advisory Committee**

Students are free to select their advisor and committee from among full-time and adjunct ESPM faculty. At a minimum one full-time ESPM faculty must be on the student's committee (three total members). If a student wishes to have a committee member from outside of ESPM, they must submit a petition to ESPM Staff. Students can get access to a list of available faculty members and their areas of interest from ESPM staff. Students must specifically request and get agreement (via email) from each committee member designating their willingness to serve. This information should be documented by the student on their GSP (Graduate Studies Plan). ESPM staff will take care of getting signatures. In the event that a student's committee composition changes, it is the responsibility of the student to notify the ESPM Staff and current Advisor and committee, get supporting documentation from new member (via email) and complete and submit a revised GSP within one week of the change.

**Peer Advisory Committees**

Students are strongly encouraged to form voluntary peer advisory committees for advice, review and support throughout the capstone project process.

**Process for Determining Course Element Scores**

Mandatory deliverables representing Project Progress Milestones (PPM) (34 pts total) must be complete and posted to Blackboard on or before 3:30pm AST on the due date. The scores for the 4 mandatory deliverables checkpoints will be determined by the instructor of record (LuAnn Piccard) after reviewing the deliverables as specified in the syllabus with feedback from the student's advisor and committee. These scores will be posted to Blackboard within one week of their due date. PM Knowledge Area Application (4 pts) performance measurements will be due at each PPM. A total possible one point will be awarded at each PPM based on instructors' evaluations of demonstration of application and performance against student determined measures.

**Note:** Many advisors/committee members will provide feedback via replies directly to your Blackboard postings. Others may provide feedback via email or other methods. It is essential to understand in advance how/when these stakeholders plan to provide feedback over the course of the semester so you don't miss out on valuable/timely feedback and/or discover late disconnects in expectations. It is also essential for students to clarify communication and feedback expectations with their committee members at the beginning of the semester. Effective project stakeholder and communications management demonstrates your ability to analyze stakeholders' communication requirements as part of a Project Communication Plan and Project Stakeholder Management Plan that will be utilized over the course of your project. A signed "Expectations Contract" will be due at PPM #2. This contract should be reviewed by the student with each committee member to establish and agree on communication needs, timing, and other expectations.

Oral Presentation (20 pts) and Final Project Management Plan (36 pts) scores will be determined by the student's advisor working with other committee members after the oral presentation and submittal of the final project management plan have been completed. Advisors are expected to poll committee members and work together to reach consensus on the oral presentation and final project management plan components of the grade recommendation. In the event that there is a disagreement among the committee members, the advisor will make the final grade recommendation. The final scores for the oral and project management plan components of the grade will be submitted to LuAnn Piccard for aggregation with the other course component scores. These scores will be posted to Blackboard.

The Leadership and Contribution to Learning of Others (6 pts) score will be assigned after all coursework (Mandatory PPM Deliverables, Oral Presentation, Project Management Plan) has been completed. The three full-time faculty members (Professors Piccard, Hull, and Kim) will discuss and make the final determination for this score for each student with input from that student's committee. This score will be posted to Blackboard.

#### Final Grade:

The final grade for the course will be determined based on the total points accumulated for the four components of the course: Project Progress Milestone Deliverables (34), Knowledge Area Application (4), Oral Presentation (20), Final Project Management Plan (36), and Leadership and Contribution to Learning of Others (6) (Total possible points=100). Scores for each course component will be posted to Blackboard in the Grade Center area. The final grade assignments will be made as follows:

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#### **Grade Assignments for PM 686A (3 units):**

90-100 points = A  
80-89.9 points = B  
70-79.9 points = C  
Below 70 points = F

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#### **Critical Administrative Deliverables and Deadlines:**

Students completing PM 686A must:

- Complete Graduate Studies Plan (by Project Progress Milestone #1) (**DO NOT POST GSP TO BLACKBOARD**) SUBMIT GSP DIRECTLY TO ESPM DEPARTMENT ADMINISTRATIVE STAFF. If the GSP changes (e.g. different courses, committee or advisor) students must provide supporting documentation of the change and a revised GSP to ESPM Staff within one week of the change.
  - Written confirmation from faculty advisor and committee members to serve. (Email is fine.)
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#### **Helpful Resources:**

MSPM Project Report Library, PM Office. Students may review and check out binders of student projects from prior semesters. There is also an electronic repository of all past projects. For access to this electronic library, contact Meuy. We also have a library faculty member dedicated to the School of Engineering. Megan Moran can be reached at [mdmoran2@uaa.alaska.edu](mailto:mdmoran2@uaa.alaska.edu).

<http://consortiumlibrary.org/>

<http://www.theresearchassistant.com/tutorial/2.asp>

**APA Formatting:** (Note: APA is **NOT** the format required for your written report but it shares some attributes with the required formatting regarding citations and bibliographies. The required PMI formatting requirements are posted in Blackboard.)

<http://owl.english.purdue.edu/owl/resource/560/2/> \*\*\*This site offers free information pertaining to APA style formats\*\*\*

<http://www.apastyle.org/> \*\*\* books on APA style formats\*\*\*

**Academic Honesty: Student Resources:**

<http://www.consortiumlibrary.org/blogs/ahi/student-resources/>

**Note:** Students may choose to submit their final 686B papers to PMI Global Congress or the PMI Research and Education Conference as student papers. In the event that your paper is selected for presentation, the PM department may

sponsor registration and travel expenses to attend that conference. Specific submittal deadlines and formatting requirements will be posted to Blackboard. The deadline for submitting an abstract for the 2013 PMI Global Congress in October was May 2013. This may be the same for the 2014 Congress. We will provide updated information as available. The PMI Research and Education Conferences are held every other year. This year it will be held in Portland OR July 27-29. The deadline for submittal is January 14, 2014. Please see information on the following website for more details. <http://www.pmi.org/Knowledge-Center/academic-research/research-conference.aspx>. At this point, the information for the Global Congress is a bit ambiguous so please contact PMI directly if you have any questions. <http://congresses.pmi.org/introduction.cfm>. Students are eligible to submit papers during the academic year that they are a student; even if the congress is the following year (e.g. completion in Dec 2014 or May 2015 can submit for student paper for Oct 2015 Congress.) This may be done during the semester students are completing PM 686B.

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### Plagiarism/Academic Dishonesty:

Plagiarism and Academic Dishonesty are strictly prohibited. Please see UAA's policy at <http://www.consortiumlibrary.org/blogs/ahi/> or bring any questions to your instructor immediately if you have concerns.

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### Disability Support Services (DSS)

If you have a disability that may affect your academic performance and are seeking accommodations due to any health concern, it is your responsibility to inform Disability Support Services as soon as possible. They are located in Rasmussen Hall 105 and can be reached by phone at (907) 786-4530 or by email at [dss@uaa.alaska.edu](mailto:dss@uaa.alaska.edu). It is important to request accommodations early enough to give DSS adequate time to consider your request and recommend reasonable accommodations. Necessary accommodations will be provided when students submit a notification letter issued by DSS to the MSPM Office.

### Course Outline:

**Classes:** There are four mandatory Friday 3:30-5:30pm afternoon class sessions during the semester in addition to informal meetings between students and their advisor/committee members. At class sessions 2, 3 and 4, students must post a one-page status briefing to Blackboard using the template posted to Blackboard. At each class session, each student will present a three minute brief on their project status. In addition to the regular class sessions, on March 21, there will be a mandatory additional session on writing, presentations and lessons learned held jointly with PM 686B. The final presentation sessions will be held all day on Monday-Tuesday April 21-22, 2014. Additional self-determined student peer advisory team meetings are optional and highly recommended. Students are responsible for coordinating informal meetings with their advisor and committee members, and establishing student advisory teams as appropriate. Mandatory class sessions will include topics essential to and supportive of achieving the course learning objectives and student success. The material presented in each of the class sessions will provide essential information for preparation of mandatory course deliverables. Students who miss class with an excused absence must view the class recording (posted to Blackboard) and produce a 3 page written summary of the material presented.



<b><u>Lecture Date and Time:</u></b>	<b><u>Topic (s):</u></b>	<b><u>Instructor/ Guest Lecturer :</u></b>	<b><u>Project Progress Performance Milestones (PPM) Due Dates:</u></b>	<b><u>Mandatory Deliverables:</u></b>
<b>Note:</b> 3:30-5:30pm AST (mandatory session) <b>Location:</b> UC 155C			<b>Note:</b> <u>Mandatory assigned deliverables must be posted to Blackboard no later than 3:30pm AST on due date listed below.</u> Late or incomplete deliverables will receive significantly lower point totals including the possibility of a "zero" score for that PPM.	
<b>Mandatory Class Session Dates and Topics</b>			<b>Project Progress Milestone Due Dates and Deliverables</b>	
<b>Friday Jan 17</b>  <b>Note:</b> At each class session, students must come prepared to make a 3 minute briefing of their project status using the template provided in Blackboard. <u>These briefings should be posted before class in the designated folder in Blackboard</u>	<b>Course Overview and Project Objectives</b> <ul style="list-style-type: none"> <li>Formulating project objectives and research questions</li> <li>Identifying and using research sources</li> <li>Academic honesty</li> </ul>	LuAnn Piccard, Roger Hull, and Seong Dae Kim  Consortium Library Representative (Megan Moran)	<b>PPM#1: Friday Jan 31</b> <b>4 points possible:</b> Quality (1.0 pts) Completeness (1.0pts) On-time (1.0 pts) Stakeholder Management and Comm. (1.0pts)  <b>Knowledge Area Selection (1.0 pt poss.)</b> <ul style="list-style-type: none"> <li>Selection of and how application and performance measured</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholder Identification and Analysis</li> <li>Project Charter (1)</li> <li>Preliminary project schedule (2)</li> <li>Preliminary WBS</li> <li>200 word Project Abstract (3)</li> <li>Letter(s) of support from project sponsor</li> <li>Preliminary GSP (including written agreement from advisor/committee members) <b>DO NOT POST GSP TO BLACKBOARD. SUBMIT DIRECTLY TO PM DEPARTMENT STAFF)</b></li> <li>Selection of 3-4 Knowledge Areas used during project to demonstrate mastery, how they will be applied to the project and how they performance will be measured.</li> </ul>

Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Deliverables	
Friday Feb 7	<b>Research and Product Planning Methodology</b> <ul style="list-style-type: none"> <li>Research sources</li> <li>Research methods</li> <li>Data gathering techniques</li> <li>Data analysis</li> <li>Confirmation of research methods appropriate to abstract and project objectives</li> </ul>	Roger Hull LuAnn Piccard	<b>PPM#2: Friday Feb 21</b>  <u><b>8 points possible:</b></u> Quality (4 pt) Completeness (1pt) On-time (1pt) Stakeholder Management and Comm. (2pt)  <u><b>Knowledge Area Selection (1.0 pt poss.)</b></u> <ul style="list-style-type: none"> <li>Application and performance</li> </ul>	<ul style="list-style-type: none"> <li>Project scope statement</li> <li>Requirements documentation</li> <li>Updated WBS</li> <li>Updated project schedule</li> <li>Tables of contents for PM Plan and Final Project Report</li> <li>Research Sources and Key Words</li> <li>Preliminary research methods and approach to analysis (e.g., surveys, interview questions, statistical analysis, etc.) (4)</li> <li>Signed Student/Advisory Committee "contract"</li> </ul>
Friday Feb 28	<b>Project Management Plan</b> <ul style="list-style-type: none"> <li>Purpose</li> <li>Format</li> <li>Content</li> <li>Change Management</li> </ul>	Roger Hull	<b>PPM#3: Friday March 14</b>  <u><b>10 points possible:</b></u> Quality (6 pts) Completeness (1pt) On-time (1pt) Stakeholder Management and Comm. (2pt)  <u><b>Knowledge Area Selection (1.0 pt poss.)</b></u> Application and performance	<ul style="list-style-type: none"> <li>Written draft of project management plan (5)</li> <li>Revised abstract</li> <li>Description of expected research methods, results and approach for analysis (6)</li> <li>Description of expected project deliverables and outcomes (e.g. tools, templates, etc.).</li> <li>Gantt chart update</li> <li>Update on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery</li> </ul>
Friday March 21	Writing, Presentation and Lesson's Learned Workshop. Joint session with PM 686B	Roger Hull Seong Dae Kim LuAnn Piccard	<ul style="list-style-type: none"> <li>Hands-on session to discuss writing, effective presentations and lessons learned.</li> </ul>	

Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Deliverables	
Friday March 28	<b>Research Analysis</b> <ul style="list-style-type: none"> <li>Research instrument and analysis approval checkpoint (5)</li> </ul>	Roger Hull	<b>PPM #4: Friday Apr 11</b> <u><b>12 points possible:</b></u> <ul style="list-style-type: none"> <li>Quality (6 pts)</li> <li>Completeness (1pt)</li> <li>On-time (1pt)</li> <li>Stakeholder Management and Comm. (2pts)</li> <li>Pre-approved research instruments and analysis methodology and IRB approval (2 pts)</li> </ul> <u><b>(Approval by Advisor and IRB submittal due by 3/28 session. IRB Approval due by PPM #4)</b></u>  <u><b>Knowledge Area Selection (1.0 pt poss.)</b></u> Application and performance  <u><b>Go/No-Go Decision:</b></u> <i>Students with approved project management plans and IRB approval will proceed to oral presentation and PM 686B admission. Students without approved project management plans and IRB approval will repeat PM 686A. (8) Students will be informed of their status no later than Wednesday April 16 at 5:30 pm. Students must have IRB approval in order to complete PM 686A.</i>	<ul style="list-style-type: none"> <li>Advisor- approved research instruments and analysis methodology (5). Approval must be documented in email.</li> <li><u><b>UAA IRB submittal complete by 3/28 class session. IRB approval due by 4/11 unless otherwise agreed with Advisor. (5)</b></u></li> <li>Professional draft presentation of project objectives, charter, project management plan description of project deliverables (6)</li> <li>Final project management plan (4) and (7). This is the version of the PM Plan that will used to determine the course score for this deliverable.</li> <li>Refined description of project deliverables</li> <li>Update on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery (PM Plan)</li> <li>Refined description of 3-4 Knowledge Areas that will be used during project execution to demonstrate mastery and how they will be applied and measured (Execution).</li> <li>Updated Gantt chart</li> </ul>



Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Deliverables	
<b>Mon-Tues April 21-22: Final Oral Defenses</b>  PM 686A and 686B presentations scheduled all day each day from 8am-9pm depending on number of students presenting. PM 686B presentations are scheduled on the hour: <u>Each PM 686B student has 30 mins to present and an additional 15 mins for Q/A for a total of 45 min.</u> There is a 15 minute transition to next presenter.  PM 686A students will have 20 minutes to present and 10 minutes for Q/A.  Total number of presenters will determine times/days.  Final Schedule: TBD			<b>Monday April 21 by 8:30am</b> (20 points)  <u>*all PM 686A presentations for all students must be posted to Blackboard by this deadline. Presentation date/time for PM 686A students is TBD but will be scheduled around PM 686B presentations.</u>	Final presentation of approved Project Plan. PowerPoint/other media.  <u><b>(APPROVED PM 686A STUDENTS ONLY)</b></u>
<b>Monday April 28</b>  <b>(No class session)</b>	Final Project Deliverables Submitted to Blackboard.  <b>NOTE:</b> In addition to the electronic copy posted to Blackboard by Monday 4/28 at 5:30 PM, a CD and a hard copy must be provided to the ESPM Department staff by Tuesday 4/29 at 5:30 pm.	Advisors and Committees	<b>Monday April 28 Submit Final Deliverables</b> (36 pts)	<ul style="list-style-type: none"> <li>Final project management plan and refined project research, deliverables, outcomes. (9)</li> <li>Final presentation slides (9)</li> <li>Separate 2-3 page summary narrative of project lessons learned.(9)</li> <li>Separate 2-3 page descriptive narrative of how focused knowledge areas were applied and measured on project</li> </ul>
<b>Monday April 28</b>  <b>(No class session)</b>	Leadership and Contribution to Learning of Others	Instructor of Record, Advisor, and Committee	<b>Monday April 28</b> (6 pts)	Assessment of effective course leadership, stakeholder management and contribution to learning of others.

**NOTES:**

- (1) Project charter should conform to format posted to Blackboard in Course Materials unless otherwise agreed. Charter should be signed by Advisor and Project Sponsor.
- (2) The project schedule should include all tasks required to complete the project deliverables. For Capstone projects, SPI and CPI are typically not appropriate or relevant. To provide a basis for measuring progress, and account for the fact that the typical Capstone project has only one resource, all tasks in the project should use an estimate of the work (hours) required, rather than estimates of duration. Project progress should be measured and reported as actual work against planned work. In a project scheduling tool (e.g., MS Project), this can be accomplished by using a \$1/hour labor rate, and reported as an "effort performance index" using the CPI function.
- (3) The Project Abstract should clearly state exactly what question or result the project has been undertaken to answer or produce, and what specific results or deliverables will be completed.
- (4) Preliminary research and analysis instruments proposed to Advisor for review.

- (5) A complete draft of a Project Management Plan is a complete project management plan which includes all subsidiary plans with substantive content for each subsidiary plan. Students should use an acceptable format for this document. If in doubt, ask advisor. Content in each subsidiary plan should be sufficient to communicate and evaluate the specific content of the student's project management plan tailored for their project. This draft should not include boilerplate or template-like prompts describing the purpose for that plan. It should include the actual content of the plan for the specific student project. Pay close attention to the written quality of this report (grammar, spelling, structure, readability of graphics, etc.) **WE ARE SERIOUS. IF YOU STRUGGLE WITH WRITING OR FORMATTING, GET HELP.** This document should be completed at a professional level of quality that a project manager would be willing to submit to a sponsor for review and approval. The formatting of this document should enable successful downloading and printing with commonly available applications. If in doubt, ask ahead of time.
- (6) For PPM #3 students should be able to describe the type of instruments they plan to use that are appropriate for the type of research/product project they will conduct and type of data they expect to collect, what type of results they might expect and how they would deal with unanticipated results, and what tools they will use to analyze those results. **Final research and analysis instruments must be approved by Advisor by the fourth class session.** If students plan to use a questionnaire, interviews or surveys, they must provide and have approved a complete, properly validated and "ready to deploy" instrument along with specific target audience/named participants. **IRB review submittal is also due by the fourth class session.** Any research method that involves people (interviews, questionnaires, etc.) requires UAA IRB approval. **IRB approval is due by PPM #4 unless otherwise agreed.** Students must receive IRB approval prior to successful completion of PM 686A and approval to enroll in PM 686B. The description of this instrument and its use must also include a clear "line of sight" from research/product objective(s) to how results will be captured, analyzed and represented.
- (7) Professional and complete draft presentation of project objectives, charter, project management plan and description of project deliverables
- (8) Final working draft of project management plan. **This is the version of the project management plan that Advisor/Committee will use to determine formal approval to proceed to oral presentation and admission to PM 686B. It will also be the version used by your committee to assign your Project Management Plan score (36 points possible). Only approved Project Management Plans will be presented by PM 686A students. If the project management plan is not approved, the student will be required to repeat PM 686A until an approved project management plan has been completed.**
- (9) The final version of the PM 686A project management plan, presentation material from oral defense, research methods focused knowledge areas selected, and lessons learned narrative must be submitted as a complete package and posted to Blackboard by 5:30pm. This material will be reviewed and your final course scores will be assigned by Advisor and committee. Advisor and committee must give formal approval of project management plan in order for student to be admitted into PM 686B. A hard copy and CD must be provided to the ESPM Department Staff by Tuesday at 5:30 pm

## Oral Presentation Evaluation Form

Presenter's Name: \_\_\_\_\_

Please rate the student's PM 686A or PM686B presentation on the following dimensions:

	1 Poor	2 Fair	3 Good	4 Excellent
1. Quality of oral presentation (Were points made clearly and concisely?)	_____	_____	_____	_____
2. Quality of visual aids used. (Were visual aids clear and easily interpretable from the audience?)	_____	_____	_____	_____
3. Quality of subject and issue defined. (Were the important subjects and issues delivered?)		_____	_____	_____
4. Quality of time allocation. (Overall, did the presenter allocate time well in presenting the project?)	_____	_____	_____	_____
5. Overall, how would you rate the quality of this project and presentation?	_____	_____	_____	_____

TOTAL SCORE = \_\_\_\_\_  
(Add values from questions 1 through 5. Total possible points= 20)

Please add any constructive comments:

Your Name \_\_\_\_\_

# PM A686B - Project Management Capstone Project

## Executing, Controlling, and Closing

Fall 2014 – UAA Master of Science in Project Management (MSPM)

[pm@uaa.alaska.edu](mailto:pm@uaa.alaska.edu) (907) 786-1924

Friday 3:30-5:30pm, UC Room 155C

### Instructors:

LuAnn Piccard	<a href="mailto:Lpiccard@uaa.alaska.edu">Lpiccard@uaa.alaska.edu</a>	(907) 786-1917
Dr. Seong Dae Kim	<a href="mailto:sdkim2@uaa.alaska.edu">sdkim2@uaa.alaska.edu</a>	(907) 786-1922
Roger Hull	<a href="mailto:rknull@uaa.alaska.edu">rknull@uaa.alaska.edu</a>	(907) 786-1923

### Administrative Support:

Meuy Saechao	<a href="mailto:msaechao2@uaa.alaska.edu">msaechao2@uaa.alaska.edu</a>	(907) 786-1924
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### AV Supervisor:

Andrew Tibor	<a href="mailto:altibor@uaa.alaska.edu">altibor@uaa.alaska.edu</a>	(907) 786-1884 Cell: (907) 350-7546
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### AV Booth

<a href="mailto:pmav@uaa.alaska.edu">pmav@uaa.alaska.edu</a>	(907) 786-1865
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### PM Website:

[www.uaa.alaska.edu/pm](http://www.uaa.alaska.edu/pm)

### Course Description PMA686B: Second 3-credit segment of the 2-semester sequence:

Individual study: research analysis, execution, controlling, closing, documentation, and presentation of the results of a project. The project, selected and approved in PM A686A, may be on a topic of the student's choosing, and may be either a significant contribution to the project management body of knowledge, or a research project that demonstrates an advanced level of understanding of applied project management principles. The project will incorporate original research and/or stakeholder needs analysis, the application of appropriate analysis tools and methods, and logically developed conclusions with regard to a research hypothesis or solutions to a defined problem related to project management opportunities and challenges. The project plan, scope and execution must be supported by the faculty advisor, committee members and student peers.

### Textbooks:

**A Guide to the Project Management Body of Knowledge (PMBOK®Guide) – 5<sup>th</sup> Edition** (2013), Project Management Institute (PMI), ISBN 978-935589-67-9

<http://marketplace.pmi.org/Pages/ProductDetail.aspx?GMPProduct=00101388701>

**Surveying Fundamentals for Business Analysis**, Carol Deutschlander, Management Concepts, 2009, ISBN 978-1-56726-255-1

### Learning Objectives and Assessment:

- Knowledge of and demonstrated mastery of project management principles and practices used in conjunction with completion of student's research or product-oriented project and the completion of project deliverables and



results. It is expected that the project will include demonstrated understanding and application of several project management knowledge areas. The requirement to include multiple knowledge areas should be included and demonstrated by the project results.

- Assessment of the overall project will be based on the quality, timeliness and completeness of Project Progress Milestone (PPM) deliverables, ability to execute, control and close an approved project, demonstration of the skill to establish relevant, measureable objectives, the ability to scope and deliver project results that achieve stated objectives, and ability to successfully manage the project against an approved baseline using the PMI PMBOK Process Groups and relevant elements of the ten Knowledge Areas.
  - Research and project results should significantly contribute to and expand the diverse project management body of knowledge. The approved project from PM A686A must be non-trivial, must proceed from a valid set of hypotheses and objectives, and should not simply be reflective of an existing body of research or open literature or existing tools and practices.
  - Research-oriented projects require the demonstration of proficiency in the selection and use of appropriate research methods and analysis tools. The project execution and conclusions must demonstrate a clear, logical linkage from observations through analysis to conclusions with well-articulated understanding of concepts like statistical significance, level of confidence, margin of error, and population sampling. Research project analysis must lead to conclusive recommendations and unique, relevant deliverables.
  - Product-oriented projects must demonstrate proficiency in the identification, analysis, and understanding of user and stakeholder needs and requirements for the product of the project (e.g., templates, tools, results, deliverables, etc.) and the ability to translate those needs into project outcomes that clearly and measurably address and meet those needs and established acceptance criteria with demonstrated customer satisfaction.
  - Clear and compelling summary documentation, a final written report, and persuasive oral defense. The quality of interim documentation and the final written report must meet fundamental standards of usage, format, terminology, grammar and structure at a level sufficient for peer-reviewed publication.
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## Measures of PM A686B Course Elements and Expectations:

### PM 686B Project Progress Performance Milestone (PPM) Deliverables (34 points)

- All status reports, deliverables, and material required by the syllabus must be posted to dated folders in Blackboard by the designated *due* date. Incomplete, poor quality or late postings will result in point reductions for this element of the course grade.
- There will be four PPM scores during the semester. Each PPM score will be assigned based on the material posted by the PPM due date. The PPM scores will be based on four criteria: On-time posting, Effective Stakeholder Management, Completeness of Deliverables, and Quality of Deliverables. Scores for each of these elements will be graduated differently for each of the PPM milestones (PPM1: 4 points, PPM2: 8 points, PPM3: 10 points, and PPM4: 12 points, for a semester total of 34 possible points). The allocation of points for each of the four criteria for each of the PPMs is noted in the syllabus summary.
- PPM's are cumulative. The scores for any PPM are based on the defined deliverables for that and all previous PPM's. The purpose of this approach is to ensure that deficiencies or omissions in prior PPM deliverable sets are properly corrected well prior to the completion of the current semester. Failure to submit the required deliverables by the posted deadline for any PPM may result in a score of zero points for that PPM. Late deliverables must be submitted by the posted deadline for the subsequent PPM in order for any points to be

awarded for the subsequent PPM, even if the subsequent PPM deliverables are posted on time. Delayed submission of one or more specified deliverables for a PPM may be negotiated in advance of the due date with the Primary Advisor and if approved must be treated as a formal change to the project schedule.

- A summary of each PPM score will be posted in the Grade Center section of Blackboard.
- Unless otherwise agreed with the students' primary advisor, PPM scores for students completing PM A686B under DF status will be evaluated based on on-time/complete postings of PPM deliverables per the current semester syllabus designated in the student's associated DF Contract. Students completing under DF status must meet with their primary advisor at or before the beginning of the semester to clarify expectations for course completion, and to formally complete the current term's Departmental DF Contract under which they will proceed.
- PPM deliverables must demonstrate mastery of PM principles, practices, tools, and methodologies learned throughout the program curriculum.
- The individual checkpoint scores will be assigned and entered into Blackboard by the instructor of record after reviewing the quality and completeness of the deliverables as specified in the syllabus with feedback from the student's advisor and committee.

#### **PM Knowledge Area Focus and Application (4 pts)**

- Each student will select 3-4 project management knowledge areas that will be applied during the executing, controlling and closing of the project. These areas will be selected based on students' interest in gaining more in-depth expertise in that area and/or where the application of focused skills, approaches tools, etc. will significantly enhance project outcomes.
- For each knowledge area selected, students will self-determine how progress and performance will be measured during the executing and closing phases of the project.
- At each PPM checkpoint, students will demonstrate how they are utilizing and measuring results from the approaches and tools that were selected, how performance of those measures was assessed and lessons learned that can be applied to on-going project work.
- Up to a total possible 1 point will be awarded at each PPM based on instructors' evaluations of the student's application and measurement of the selected areas.

#### **PM A686B Oral Presentation (20 points)**

- Presentation is well organized, complete and well-presented within time constraints.
- Material covered addresses the main points of the project in clear, concise, and insightful manner that demonstrates student's mastery of project subject material.
- Material presented represents a complete summary of the project's objectives, results, outcomes, and conclusions and is effectively supported by presentation content, data, and graphics and other relevant material/results.
- Questions and comments are addressed completely and thoroughly and demonstrate student's deeper understanding of subject material.



- Students should invite their project sponsor and are also encouraged to invite other project stakeholders (employers, friends, family, colleagues, etc.) to the oral presentation. Students' advisors and committee members are also expected to attend.
- The final score for this item will be based on scores provided by the student's advisor and committee members along with input from presentation attendees. These completed evaluation forms are considered internal documents and copies will not be provided to students. (See attached presentation evaluation).

### **PM 686B Final Project Deliverables and Written Report (36 pts)**

- Final project deliverables, research results, project outcomes, and written report are fully consistent with the original approved abstract.
- Final project deliverables and written report are well organized, well written (grammar, vocabulary, spelling, etc.) and neatly formatted within the paper formatting guidelines established for the course. (See Blackboard for formatting requirements).
- The body of your final written report should be **no less than 20 pages in length and not more than 35 pages** (not including appendices). In the event that students choose to submit their papers for the PMI Global Congress 2015, papers will need to be shortened to conform to PMI requirements.
- Final report contains all relevant information necessary to demonstrate a professional level of completion to support achievement of project objectives defined at onset of course.
- Project research and results clearly support achievement of original approved project objectives.
- Project report and deliverables clearly demonstrate mastery of project management and provide unique contribution to PM knowledge, including insights that represent value to others in the field.
- Supporting data and analysis show direct correlation to the subject material and conclusively support the project results.
- Graphics, charts and other visuals support text and are clearly referenced in the document.
- All research, diagrams, photographs and other sources of material are properly and completely cited in the report body as well as in bibliography and reference sections at the end of the document.
- Appendices and supporting material are appropriately developed and referenced in the body of the report.
- All required elements described in mandatory deliverables must be included in the final hardcopy written report submission. This copy will be placed in a formal, designated binder with section tabs provided by the PM Department administrative staff. One CD must also be submitted with complete electronic files:
- Note: The detailed outline and order of final deliverables is posted in Blackboard.
  - PM A686B written project report (per specified format and outline)
  - Summary research results and analysis (e.g., literature search, summary analysis, etc.) as appropriate.
  - Project deliverables; e.g., specific tangible tools, templates, checklists, etc., created as end products of the project.
  - Appendices and attachments (Project Progress Performance Deliverables, etc.)

- Project Charter
- Final updated Project Management Plan including change log and updates/changes to all subsidiary plans and project documents.
- Employer/Sponsor letter(s) of support
- WBS
- Research tools, data and detailed results; e.g., survey/interview questions, detailed research data/responses, statistical analysis, etc., as appropriate.
- Tracking Gantt charts
- Other relevant information as appropriate
- Copy of Final PowerPoint Presentation
- Separate written narrative describing Knowledge Area processes/tools that were selected in PPM#1 and used in conjunction with project to demonstrate mastery of project management concepts. (2-3 page summary narrative in separate section of binder.)
- Separate written summary of key PM A686B project lessons learned (2-3 page summary narrative to accompany final report in separate section of binder.)
- NOTE: These files should also be posted in their final form on Blackboard.
- The final score for this item will be determined by a review of the final report and deliverables by the student's advisor and committee based on the version of the report and project deliverables submitted at PPM #4.

#### **PM A686B Leadership and Contribution to Learning of Others (6 pts)**

- Up to six points will be awarded for course leadership, contribution to learning of others and participation in class sessions. Note: these points are not solely awarded based on class session attendance.
- This score will be determined by the members of the full-time faculty team with inputs from the students' committee members.

#### **Selection of Student's Advisory Committee**

Students are free to select their advisor and committee from among full-time and adjunct ESPM faculty. At a minimum one full-time ESPM faculty must be on the student's committee (three total members). If a student wishes to have a committee member from outside of ESPM, they must submit a petition to ESPM Staff or posted on Blackboard. Students can obtain access to a list of available faculty members and their areas of interest from ESPM staff. Students must specifically request and get agreement (via email) from each committee member designating their willingness to serve. This information should be documented by the student on their GSP (Graduate Studies Plan). ESPM staff will obtain signatures. In the event that a student's committee composition changes, it is the responsibility of the student to notify the ESPM Staff and current Advisor and committee, get supporting documentation from new member (via email) and complete and submit a revised GSP within one week of the change.

**Note:** Advisors/committee members may provide feedback via replies directly to your Blackboard postings. Others may provide feedback via email or other methods. It is essential to understand in advance how/when these stakeholders plan to provide feedback over the course of the semester so you don't miss out on valuable/timely feedback and/or discover late disconnects in expectations. It is also essential for students to clarify communication and feedback expectations with their committee members at the beginning of the semester. Effective project communications management demonstrates your ability to analyze stakeholders' communication requirements as part of a Project Communication Plan and Manage Stakeholders Expectations over the course of your project. An updated version of the "Expectations Contract" established in PM A686A will be due at PPM #1. This contract should be reviewed by the student with each committee member and updated to reflect any changes to communication needs, timing, and other expectations. Your proactive interaction with your advisory committee is the basis for the Stakeholder Management and Communication score at each PPM.

**Peer Advisory Groups**

Students are strongly encouraged to form voluntary peer advisory groups for collaborative advice, review and support throughout the Capstone project process.

**Process for Determining Course Element Scores**

Mandatory deliverables representing Project Progress Milestones (PPM) (34 pts total) must be complete and posted to Blackboard on or before 3:30pm on the due date. The scores for the 4 mandatory deliverables checkpoints will be determined by the Instructor of Record (LuAnn Piccard) after reviewing the deliverables as specified in the syllabus with feedback from the student's advisor and committee. These scores will be posted to Blackboard within one week of their due date. PM Knowledge Area Application and Measurement (4 pts total) application/performance measurements will be due at each PPM. A total possible one point will be awarded at each PPM based on instructors' evaluations of demonstration of application and performance against student determined measures.

Oral Presentation (20 pts) and Final Project Deliverables and Written Report (36 pts) scores will be determined by the student's advisor working with other committee members after the oral presentation and submittal of the final written report have been completed. Advisors are expected to poll committee members and work together to reach consensus on the oral presentation and final project deliverables and written report components of the grade recommendation. In the event that there is a disagreement among the committee members, the advisor will make the final grade recommendation. The final scores for the oral and written components of the grade will be submitted to LuAnn Piccard for aggregation with the other course component scores. These scores will be posted to Blackboard.

Leadership and Contribution to Learning of Others (6 pts) score will be assigned after all coursework (Mandatory PPM Deliverables, Oral Presentation, Final Project Deliverables and Written Report) has been completed. The three full-time faculty members (LuAnn, Roger, and Seong Dae) will discuss and make the final determination for this score for each student with input from that student's committee. This score will be posted to Blackboard.

**Final Grade:**

The final grade for the course will be determined based on the total points accumulated for the four components of the course: Project Progress Milestone Deliverables (34), Knowledge Area Application/Measurement (4), Oral Presentation (20), Final Project Deliverables and Written Report (36), and Leadership and Contribution to Learning of Others (6) (Total possible points=100). Scores for each course component will be posted to Blackboard in Grade Center area. The final grade assignments will be made as follows:

**Grade Assignments for PM 686B (3 credits):**

- 90-100 points = A
- 80-89.9 points = B
- 70-79.9 points = C
- Below 70 points = F

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**Critical Administrative Deliverables and Deadlines:**

Students completing PM A686B must also:

- Complete/confirm signed FINAL Graduate Studies Plan by Project Progress Milestone #1  
DO NOT POST GSP TO BLACKBOARD. SUBMIT GSP DIRECTLY TO ESPM ADMINISTRATIVE STAFF.
- Coordinate with the Administrative Staff regarding any items on enrollment services or department degree audit(s)
- Apply for Graduation (as appropriate)

- There may be a separate commencement ceremony for fall semester graduates. It is not clear if there will be a separate graduate hooding ceremony. Any related information will be provided as it is known.
    - The deadline for fall graduation is December 5, 2014.
    - The application deadline for spring semester (2015) graduation is: April 1, 2015 (to have name in commencement program) or final deadline, April 25, 2015.
  - RSVP to UAA Commencement Website if you will attend:
    - a. Hooding and/or
    - b. Commencement
  - Rent cap, gown and *SOE orange* colored hood for Hooding Ceremony and Commencement (if attending annual spring celebrations)
  - Please see the Course Materials>Administrative Documents for Graduation section of your Blackboard site for a complete list of needs, deliverables, and instructions
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## Helpful Resources:

MSPM Project Report Library, PM Office (Students may review and check out binders with student projects from prior semesters, see Meuy Saechao. We also have a library faculty member dedicated to the School of Engineering. Megan Moran can be reached at [mdmoran2@uaa.alaska.edu](mailto:mdmoran2@uaa.alaska.edu). <http://consortiumlibrary.org/>

### Research:

<http://www.theresearchassistant.com/tutorial/2.asp>

APA Formatting: (*Note: APA is NOT the format required for your written report but it shares some attributes with the required formatting regarding citations and bibliographies. The required PMI formatting requirements are posted in Blackboard.*)

<http://owl.english.purdue.edu/owl/resource/560/2/> \*\*\*This site offers free information pertaining to APA style formats\*\*\*

<http://www.apastyle.org/> \*\*\* books on APA style formats\*\*\*

### Academic Honesty: Student Resources:

<http://www.consortiumlibrary.org/blogs/ahi/student-resources/>

**Note:** Students may choose to submit their final PM A686B papers to PMI Global Congress or the PMI Research and Education Conference as student papers. In the event that your paper is selected for presentation, the PM department may sponsor registration and travel expenses to attend that conference. Specific submittal deadlines and formatting requirements will be posted to Blackboard. The deadline for submitting an abstract for the 2014 PMI Global Congress in October was May 2014. This may be the same for the 2015 Congress. We will provide updated information as available. At this point, the information for the Global Congress is tentative so please contact PMI directly if you have any questions. <http://congresses.pmi.org/introduction.cfm>. Students are eligible to submit papers during the academic year that they are a student; even if the congress is the following year (e.g., completion in Dec 2014 or May 2015 may submit for student paper for Oct 2015 Congress.) This may be done during the semester students are completing PM A686B.

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**Plagiarism/Academic Dishonesty:**

Plagiarism and Academic Dishonesty are strictly prohibited. Please see UAA's policy at <http://www.consortiumlibrary.org/blogs/ahi/> or bring any questions to your instructor immediately if you have concerns. This applies specifically to the use of uncited material taken from other sources, excessive use of direct quotes, direct quotes of any length not properly marked as such, and the failure to acknowledge copyrighted material. Any material (statements, graphics, data, conclusions, etc.) used in your final deliverables that you did not personally originate must be properly marked, referenced or cited.

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**Disability Support Services (DSS)**

If you have a disability that may affect your academic performance and are seeking accommodation due to any health concern, it is your responsibility to inform Disability Support Services as soon as possible. They are located in Rasmussen Hall 105 and can be reached by phone at (907) 786-4530 or by email at [dss@uaa.alaska.edu](mailto:dss@uaa.alaska.edu). It is important to request accommodation early enough to give DSS adequate time to consider your request and recommend reasonable accommodation. Necessary accommodation will be provided when the department is provided formal notification from DSS.

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**Care Team Support for Students:**

If you or someone you know, needs support, is distressed, or exhibits concerning behavior, help by making a referral to the CARE Team. The UAA Care Team's purpose is to promote a safe and productive learning, living, and working environment by addressing the needs of students. As your faculty, we may contact the CARE team to seek support for students. We encourage you to fill out a referral if you or a classmate may be in need of help. Here are several ways to contact the CARE Team:

1. Fill out a referral: <http://www.uaa.alaska.edu/CareTeam>
2. Email your concern to [Care@uaa.alaska.edu](mailto:Care@uaa.alaska.edu)
3. Call the Care Team phone number: 907-786-6065

**If the issue is an emergency, call UAA Police Department (UPD) at 907-786-1120 or dial 911**

**Course Outline:**

**Classes:** There are four mandatory Friday afternoon (3:30-5:30pm) class sessions during the semester in addition to informal meetings between students and their advisor/committee members. At class sessions 1, 2, 3 and 4, students must post a one-page status briefing to Blackboard using the template posted to Blackboard. At each class session, each student will present a three-minute brief on their project status. In addition to the regular class sessions, on October 31, there will be a mandatory additional session on writing, presentations and lessons learned held jointly with PM 686A. The final presentation sessions will be held all day on Monday-Tuesday December 1-2, 2014. Additional self-determined student peer advisory group meetings are optional and highly recommended. Students are responsible for coordinating informal meetings with their advisor and committee members, and establishing student advisory groups as appropriate. Mandatory class sessions will include topics essential to and supportive of achieving the course learning objectives and student success. The material presented in each of the class sessions will provide essential information for preparation of mandatory course deliverables. Students who miss class with an excused absence must view the class recording (posted to Blackboard) and produce a 3-page written summary of the material presented. This summary should be emailed within one week of the missed class session to LuAnn Piccard at [Lpiccard@uaa.alaska.edu](mailto:Lpiccard@uaa.alaska.edu).



<u>Lecture Date and Time:</u> 3:30-5:30pm AST (mandatory session) <u>Location:</u> UC 155C	Topics	<u>Instructor/ Guest Lecturer :</u>	<u>Project Progress Performance Milestones (PPM) Due Dates:</u>  <u>Mandatory assigned deliverables must be posted to Blackboard no later than 3:30pm AST on due date listed below.</u> Late or incomplete deliverables will receive significantly lower point totals including the possibility of a "zero" score for that PPM.	<u>Mandatory Deliverables:</u>  (See list for each respective PPM below)
<b>Mandatory Class Session Dates and Topics</b>			<b>Project Progress Milestone Due Dates and Mandatory Deliverables</b>	
<b>Friday Sept 5</b>  <u>Note:</u> At each class session, students must come prepared to make a 3-minute briefing of their project status using the template provided in Blackboard. <u>These briefings should be posted before class in the designated folder in Blackboard</u>	<b>Monitoring and Controlling Projects</b> <ul style="list-style-type: none"> <li>Project Baseline</li> <li>Measuring project progress</li> <li>Controlling change</li> <li>Risk Management</li> <li>Stakeholder Management</li> </ul> Performance and status reporting	LuAnn Piccard, Seong Dae Kim, Roger Hull	<b>PPM#1: Friday Sept 19</b> <b>5 total points possible</b>  <u>PPM Deliverables:</u> <b>4 points possible:</b> <ul style="list-style-type: none"> <li>Quality (1.0 pt)</li> <li>Completeness (1.0 pt)</li> <li>On-time (1.0 pt)</li> <li>Stakeholder Management and Comm. (1.0 pt)</li> </ul> <u>Knowledge Area Performance Measurement</u> <b>1.0 pt poss.</b> <ul style="list-style-type: none"> <li>Application and performance measurement</li> </ul>	<u>PPM Deliverables:</u> <ul style="list-style-type: none"> <li>Change Control Process, Project progress method and status (e.g. EVM, other)</li> <li>Project Management Plan updates (using change control process):               <ul style="list-style-type: none"> <li>Updated requirements traceability matrix</li> <li>Updated WBS</li> <li>Updated Gantt</li> <li>Updated risk register</li> <li>Other</li> </ul> </li> <li>Risk response implementation</li> <li>Project deliverables status update</li> <li>Data collection/research update (should have all raw data at this point)</li> <li>Updates (if any) on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery</li> <li><i>Final</i> signed GSP directly to PM Department Staff (DO NOT POST GSP TO BLACKBOARD!)</li> <li>Updated Student/Advisory Committee Expectations Contract</li> </ul>

Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Mandatory Deliverables	
Friday Sept 26	<u><b>Interpretation of Research Results</b></u> <ul style="list-style-type: none"> <li>Data/research Analysis</li> <li>Interpretation of research results</li> <li>Representation of research results</li> <li>Evaluation of research and demonstration of logical flow from hypothesis and objectives linked with research results to conclusions and recommendations</li> </ul>	Roger Hull	<b>PPM#2: Fri Oct 10</b> <b>9 points possible</b>  <u><b>PPM Deliverables:</b></u> <b>8.0 points possible:</b> <ul style="list-style-type: none"> <li>Quality (4 pts)</li> <li>Completeness (1pt)</li> <li>On-time (1pt)</li> <li>Stakeholder Management and Comm. (2pts)</li> </ul> <u><b>Knowledge Area Application and Measurement</b></u> <b>1.0 pt poss.</b> <ul style="list-style-type: none"> <li>Application and performance measurement</li> </ul>	<u><b>PPM Deliverables:</b></u> <ul style="list-style-type: none"> <li>Updated Abstract</li> <li>Updated Table of Contents</li> <li>Updated research sources and Key Words update</li> <li>Validated research analysis (1) (needs advisor approval)</li> <li>Project progress status (e.g. EVM, other)</li> <li>Project Management Plan updates (using change control process):               <ul style="list-style-type: none"> <li>Updated requirements traceability matrix</li> <li>Updated WBS changes</li> <li>Updated project schedule (2)</li> <li>Risk Register updates</li> <li>Other project documents</li> </ul> </li> <li>Risk response implementation</li> <li>Project deliverables status update</li> </ul>
<b>Wednesday Oct 15, 5:30 pm: First PM A686B Go/ No-Go Checkpoint</b> Decision by Advisor and Committee. Students that have not met checkpoint deliverables on time and at sufficient level of completeness, quality, and depth will be given a No-Go Status and defaulted to complete Fall 2014 per the remaining PM A686B Syllabus, <u>but will receive a DF for the course and must repeat PM A686B in a following semester (Spring 2015).</u> Students carrying DF grade in <i>either</i> capstone course segment must maintain "continuous registration" by re-enroll in subsequent term(s) in EXTM A699 to support work toward their Capstone project and Program completion. At this checkpoint, students may be given a "provisional go" status to address minor shortfalls. Under provisional status, students must complete any required items by dates agreed with advisor or status will be "No-Go."				

Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Mandatory Deliverables	
Friday Oct 24	Technical Writing and Formatting	Roger Hull	<p><b>PPM#3: Fri Nov 7</b> <b>11 points possible</b></p> <p><b>PPM Deliverables:</b> <b>10 points possible:</b></p> <ul style="list-style-type: none"> <li>Quality (6 pts)</li> <li>Completeness (1pt)</li> <li>On-time (1pt)</li> <li>Stakeholder Management and Comm. (2pts)</li> </ul> <p><b>Knowledge Area Application and Measurement</b> <b>1.0 pt poss.</b></p> <ul style="list-style-type: none"> <li>Application and performance measurement</li> </ul>	<p><b>PPM Deliverables:</b></p> <ul style="list-style-type: none"> <li>Working draft of complete and properly formatted paper (3)</li> <li>Revised Abstract</li> <li>Research results and analysis</li> <li>Preliminary conclusions and project deliverables</li> <li>Updated project schedule</li> </ul> <p><b>Second PM A686B Go/No-Go Decision Checkpoint Wed 11/12 5:30 pm.</b></p>
Friday Oct 31	Writing, Presentation and Lessons Learned Workshop. Joint session with PM A686A	Roger Hull	Hands-on session to discuss writing, effective presentations and lessons learned.	
Friday Nov 14	Great Presentations		<p><b>PPM #4: Fri Nov 21</b> <b>13 points possible</b></p> <p><b>PPM Deliverables</b> <b>12 points possible:</b></p> <ul style="list-style-type: none"> <li>Quality (7 pts)</li> <li>Completeness (1pt)</li> <li>On-time (1pt)</li> <li>Stakeholder Management and Comm. (3pts)</li> </ul> <p><b>Knowledge Area Application and Measurement</b> <b>1.0 pt poss.</b></p> <ul style="list-style-type: none"> <li>Application and performance measurement</li> </ul>	<p><b>PPM Deliverables:</b></p> <ul style="list-style-type: none"> <li>Draft presentation (5)</li> <li>Final complete and properly formatted project report and final project deliverables (paper, research, outcomes, products, etc.) (4)</li> <li>Updated project schedule (2)</li> </ul> <p><b>Final PM A686B Go/No-Go Decision Checkpoint Wed 11/26 5:30 pm.</b></p>



Mandatory Class Session Dates and Topics		Project Progress Milestone Due Dates and Mandatory Deliverables	
<b>Mon-Tues Dec 1-2: Final Oral Defenses</b>	<p>PM A686A and PM A686B presentations are scheduled throughout the day on each day between 8am-9pm depending on number of students presenting and availability of advisory committee members.</p> <p>PM A686B presentations are scheduled on the hour: Each PM A686B student has 30 minutes to present and an additional 15 minutes for Q/A for a total of 45 minutes. There is a minimum 15 minute transition between presenters.</p> <p>Total number of presenters and advisory committee availability will determine specific presentation times/days.</p> <p>Final Schedule: TBD. Normally posted one week prior to final presentations.</p>	<p>Students, Advisors and Committees, Sponsors, Stakeholders</p> <p>To the extent possible, PM A686B students should plan to attend other PM A686B capstone presentations or watch videos.</p>	<p><b>Monday Dec 1 by 8:00 am (20 pts)</b></p> <p><i>* Presentations for ALL students must be posted to Blackboard by this deadline, regardless of scheduled presentation date/time.</i></p> <p>Final Oral Presentation. PowerPoint/other media</p>
<b>Mon Dec 8 and Tues Dec 9</b>  <b>(No class session)</b>	<p>Submit Final Project Deliverables. All deliverables must be posted to Blackboard in a single zip file by 5:30pm on Monday <b>12/8</b>.</p> <p>One hard copy and CD must be provided to the ESPM Offices by 5:30 pm on Tuesday <b>12/9</b>. ESPM Department will provide binders and tabs.</p> <p>Distance students make separate arrangements with ESPM office for local printing.</p>	<p>Students</p>	<p><b>Mon-Tues Dec 8-9 Submit Final Deliverables</b></p> <p>(36 pts)</p> <ul style="list-style-type: none"> <li>• Final report, to include one hard copy of complete report, appendices, mandatory deliverables and PowerPoint presentation. One copy will be placed in tabbed binder provided by the Department for MSPM library with a CD of complete copy of electronic files.</li> <li>• 2-3 page summary narrative of project lessons learned included in separate section of project binder.</li> <li>• Narrative on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery. Performance measured and lessons learned.</li> <li>• See Blackboard for full description of required deliverables.</li> </ul>

Mandatory Class Session Dates and Topics			Project Progress Milestone Due Dates and Mandatory Deliverables	
<u>Wed Dec 10</u>  (No class session)	Final course scores including Leadership and Contribution to Learning of Others	Instructor of Record, Advisor, Committee post to BB.	<u>Wed Dec 10</u> Final deliverables (36 pts poss), presentation (20 pts poss), and LCLO scores posted to BB(6 pts poss)	Assessment of effective course leadership, stakeholder management and contribution to learning of others.
<u>Saturday Dec 13, 2014</u>	Graduate Hooding Ceremony – TBD	If this ceremony is held for summer and fall graduates, all graduating students from summer and fall semesters are encouraged to attend this graduate-student only ceremony and reception. This ceremony is usually held at the Wendy Williamson Auditorium on main campus but may be shifted to the new Alaska Airlines Sports Center. RSVP required.		
<u>Sunday Dec 14, 2014</u>	UAA Commencement Ceremony – Summer and fall graduates only. All graduating students from summer and fall semesters are encouraged to attend the general UAA commencement ceremony with all other UAA graduates (undergraduate and graduate). This ceremony may be held at the new Alaska Airlines Sports Center is usually held at Sullivan Arena.			

**NOTES:**

- (1) Research analysis must be approved by Advisor and Committee prior to passing through the first Go/No-Go checkpoint.
- (2) The project schedule should include all tasks required to complete the project deliverables. For Capstone projects, SPI and CPI are typically not appropriate or relevant. To provide a basis for measuring progress, and account for the fact that the typical Capstone project has only one resource, all tasks in the project should use an estimate of the work (hours) required, rather than estimates of duration. Project progress should be measured and reported as actual work against planned work. In a project scheduling tool (e.g., MS Project), this can be accomplished by using a \$1/hour labor rate, and reported as an “effort performance index” using the CPI function.
- (3) A “working draft of a complete and properly formatted paper” (with a minimum of placeholders) is a complete draft of the paper that includes content in all sections of the paper and preliminary project deliverables sufficient for the student’s advisor and committee to see clear evidence and status of work and be able to provide relevant targeted feedback. **[NOTE: If you struggle with structuring and writing a paper you should seek out resources to help you before submitting this draft (e.g., Consortium Library, Writing Center, editors, etc.)]** **Reports that are incomplete or are submitted with grammar, spelling, structural or formatting problems will be returned and not receive a good score for this checkpoint.** At this point, you should have produced a complete working draft of the written report but may continue to add content as research results and project deliverables are further analyzed, produced, and refined. **This is a second Go/No-Go checkpoint for PM A686B. If student does not produce deliverables for PPM#3 of sufficient quality and completeness and/or demonstrate sufficient progress towards completion of PM A686B, they will be required to work on PM 686B deliverables for the remainder of the semester, and if coursework is deemed sufficient at the end of term a ‘DF’ grade will be assigned enabling student to continue work in a future semester under the PM A686B syllabus.**
- (4) A “final draft” is complete, well-organized and written at a level that the student’s advisor and committee members can conduct a final review and provide final tuning feedback. This version should include all data, analysis, outcomes, recommendations, and conclusions. **Reports that are incomplete or are submitted with grammar, spelling, structural or formatting problems will not receive a good score for this checkpoint.** This is the point at which students should confidently submit the written report to peers and committees for final minor tuning and feedback that can help prepare for the oral presentation and complete the final written report. **This is the version of the final report and deliverables that will be evaluated to assign a score (36 points possible)**



**for this deliverable. This is also the third and final Go/No-Go checkpoint for PM A686B. If student does not produce deliverables for PPM#4 of sufficient quality and completeness and/or demonstrate sufficient progress towards completion of PM A686B, they will be required to complete PM A686B deliverables for the remainder of the semester and receive a DF in PM A686B and continue their work in a future semester of PM A686B.**

- (5) Professional and complete draft presentation of project results and deliverables.

## Oral Presentation Evaluation Form

Presenter's Name: \_\_\_\_\_

Please rate the student's PM 686A or PM686B presentation on the following dimensions:

	1 Poor	2 Fair	3 Good	4 Excellent
1. Quality of oral presentation (Were points made clearly and concisely?)	_____	_____	_____	_____
2. Quality of visual aids used. (Were visual aids clear and easily interpretable from the audience?)	_____	_____	_____	_____
3. Quality of subject and issue defined. (Were the important subjects and issues delivered?)	_____	_____	_____	_____
4. Quality of time allocation. (Overall, did the presenter allocate time well in presenting the project?)	_____	_____	_____	_____
5. Overall, how would you rate the quality of this project and presentation?	_____	_____	_____	_____

TOTAL SCORE = \_\_\_\_\_  
(Add values from questions 1 through 5. Total possible points= 20)

Please add any constructive comments:

Your Name \_\_\_\_\_





BP EXPLORATION (ALASKA) INC.

# Letters from Project Sponsors

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Development of a Prioritization Tool for BP Exploration  
(Alaska) Inc. Category C Projects

**Prepared by: Carlos Lujan**

BP Project Sponsor and Legal Counsel Support Letters also located in Project Management Plan



Lujan, Carlos (BP)

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From: Spitz, Michael  
Sent: Tuesday, February 04, 2014 5:07 PM  
To: Lujan, Carlos (BP)  
Subject: RE: PM 686A PPM#1 Deliverable - Letter of Support from Project Sponsor

Carlos,  
I think this will be a good project for you and for BP. I'm happy to support this in any way that I can.

**Michael D Spitz, PE**  
FEL Team Lead, Projects & Modifications  
BP Exploration Alaska  
Office: 907.564.4926  
Cell: 907.317.3914

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From: Lujan, Carlos (BP)  
Sent: Saturday, February 01, 2014 3:58 PM  
To: Spitz, Michael  
Subject: PM 686A PPM#1 Deliverable - Letter of Support from Project Sponsor

Mike,

Please review preliminary project thesis abstract listed below:

BP Exploration Alaska Projects and Modifications Team (PMT) provides front end loading (FEL) engineering and construction planning services for category "C" projects (range from \$200,000 - \$15,000,000) through BP's Capital Value Process (CVP), a stage gated project development process. The production of oil and gas is declining in Alaska and forecasts of future development are uncertain. It is critical that the prioritization process for Cat C projects be clearly developed and understood to maximize BP's return on investment and to ensure that the existing process facilities retain their rights to operate through continued operational integrity with fit-for-service improvements.

This research paper will provide a step-by-step process to assist with defining business objectives and the subsequent prioritization for BP Cat C projects. An analysis of existing BP Cat A and B business objectives and prioritization literature will provide background information on current strategies. Analysis of interviews with Subject Matter Experts (SMEs) from BP Cat A and B Global Projects Organization will provide their view points on the subject. The feasibility and applicability of other successful oil and gas industry organization's priority strategies with similar budget boundaries will be examined. This product-oriented project will include research, development, design, and documentation to logically apply a step-by-step PMT process to identify business objectives to assist with Cat C project prioritization.

I believe this abstract addresses the PMT Cat C deliverables we have previously discussed. Please let me know if there is anything else I should include.

Please respond with an email with your support of my thesis project if you agree with abstract listed above.

Thank You,

**Carlos Lujan**  
AK, OPS PMT PL-Lujan  
(907) 564-5274 Office

## BP Exploration (Alaska) Inc. Letter of Support

March 28th 2014

Attn: Institutional Review Board  
Office of Research and Graduate Studies  
University of Alaska Anchorage  
3211 Providence Drive  
Anchorage, AK 99508

Dear IRB Members,

This memo certifies that **Carlos Lujan** has shared and discussed the study titled Development of a Prioritization Tool for BP Exploration Alaska Category C Projects with myself a representative of our company, BP Exploration Alaska.

Carlos Lujan has shared his Project Management Plan, dated 3/13/14, with myself. This memo also confirms that **Carlos Lujan** has permission to conduct the above stated study at BP Alaska for the Master of Science in Project Management (MSPM) at the University of Alaska Anchorage.

I do not have concerns about the proposed study based on communication with **Carlos Lujan**. The company supports the research plan and approves of the project, which includes survey of participants and data collection, through our company.

Sincerely,



**Michael D Spitz, PE**

FEL Team Lead, Projects & Modifications

**BP Exploration Alaska**

Office: 907.564.4926

Cell: 907.317.3914

Lujan, Carlos (BP)

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From: Buckendorf, Randal  
Sent: Monday, April 07, 2014 4:50 PM  
To: Lujan, Carlos (BP)  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Carlos,

I enjoyed visiting with you about your Thesis proposal. As we discussed, the information is confidential but you have the support of the key and relevant management to use it as part of seeking your Master's Degree in project management. Nothing however is proprietary in nature that you cannot use it as part of the project. I support you proceeding forward. As we discussed, I would like the opportunity to review the final Thesis submittal prior to its submission to the University.

Thanks for seeking out legal input.

Randal

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From: Lujan, Carlos (BP)  
Sent: Monday, April 07, 2014 3:28 PM  
To: Buckendorf, Randal  
Subject: FW: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

Please review project management plan attached. Please send me an email and let me know that I do have permission from BP to interview subject matter experts and that the tool I will be developing is something I can present and not considered confidential.

Thank You,

**Carlos Lujan**

**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Lujan, Carlos (BP)  
Sent: Monday, March 17, 2014 1:21 PM  
To: Spitz, Michael ([Michael.Spitz@bp.com](mailto:Michael.Spitz@bp.com))  
Cc: Okonek, Les J  
Subject: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Mike,

Please review project management plan attached. Please send me an email and let me know that I do have permission from BP to interview subject matter experts and that the tool I will be developing is something I can present and not considered confidential.

Thank You,

**Carlos Lujan**

**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

Lujan, Carlos (BP)

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From: Schulte, Ray  
Sent: Monday, November 17, 2014 2:51 PM  
To: Lujan, Carlos (BP)  
Subject: Paper Review

Carlos,  
I thorough enjoyed the review today of your completed masters project. I approve of it 100%. Cheers  
Ray Schulte



Lujan, Carlos (BP)

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From: Almon, Walter  
Sent: Monday, November 17, 2014 6:33 PM  
To: Lujan, Carlos (BP); Buckendorf, Randal  
Cc: Schulte, Ray; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Carlos – regarding your project paper; thank you for reviewing it with us this afternoon. The several tools that are being produced by this project will be useful to aid the progression of Category C projects. The particular methodology you employ is generic, non-proprietary, and widely available on the outside market. You are utilizing these public tools and methodologies in an effective manner.

Regards,

**Walter S. Almon, PE, PMP**  
**Operation Mechanical Civil & Lifting Discipline Team Lead**  
BP Alaska Operations-Anchorage, 1244D  
(907) 564-5371 work (907) 632-8122 cell

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:57 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

I have pulled together document with Ray Schulte (PMT Risk Manager) review. I will meet with Mike Spitz (PMT FEL TL), Walt Almon (Ops Mech, Civil & Lift Engineer Team Lead, Alaska Operations-Engineering Svcs), and Ray Schulte to review and approve. I will send you an email and leave a message when this task is completed.

I thank you again for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 9:47 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Prior to my review I need to know that everyone in Projects has reviewed and approved this as well.

Randal

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:36 AM  
To: Buckendorf, Randal



Cc: Schulte, Ray; Almon, Walter; Spitz, Michael

Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

Please review preliminary project paper. I believe I have documented information which is not proprietary to BP. I would like to set up a meeting with you early this week to discuss. I need your approval to submit final paper and complete PM 686B course. I will call to follow up.

I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

Lujan, Carlos (BP)

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From: Spitz, Michael  
Sent: Tuesday, November 18, 2014 8:11 AM  
To: Lujan, Carlos (BP); Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Carlos,

Thanks for reviewing the document with me yesterday. This has my approval to move forward.

**Michael D Spitz, PE**  
FEL Team Lead, Projects & Modifications  
BP Exploration Alaska  
Office: 907.564.4926  
Cell: 907.317.3914

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:57 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

I have pulled together document with Ray Schulte (PMT Risk Manager) review. I will meet with Mike Spitz (PMT FEL TL), Walt Almon (Ops Mech, Civil & Lift Engineer Team Lead, Alaska Operations-Engineering Svcs), and Ray Schulte to review and approve. I will send you an email and leave a message when this task is completed.

I thank you again for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 9:47 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Prior to my review I need to know that everyone in Projects has reviewed and approved this as well.

Randal

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:36 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

Please review preliminary project paper. I believe I have documented information which is not proprietary to BP. I would like to set up a meeting with you early this week to discuss. I need your approval to submit final paper and complete PM 686B course. I will call to follow up.

I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

Lujan, Carlos (BP)

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From: Lujan, Carlos (BP)  
Sent: Wednesday, November 19, 2014 11:51 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael; 'LuAnn Piccard'  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP  
Proprietary  
Information

Randal,

I will make modifications as you have suggested. You had mentioned that this is a good paper. I will submit paper to the University of Alaska Anchorage by Friday 11/21/14.

Once again, I thank you for your time and

effort. Have a great day.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Wednesday, November 19, 2014 11:23 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Carlos,

I took the paper home last night and have some comments for you. I tried to drop off at your desk at the office listed in the GAL but it said 942d which is vacant. Not sure where you let me know I will drop them off as I head down to lunch. I will also try 12 where Walt and Mike are.

Randal

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From: Lujan, Carlos (BP)  
Sent: Tuesday, November 18, 2014 9:37 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

I was able to meet and review the document with Mike Spitz, Ray Schulte, and Walter Almon yesterday. I've incorporated their comments into the paper. I have also received endorsements (attached emails) from each individual to move forward.

I must submit this paper to the University of Alaska Anchorage by Thursday evening 11/20/14. Please review and let me know if there is anything else you require. If there are no other requirements, please send an email with your approval.

I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 10:28 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Thanks Carlos.

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:57 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

Randal,

I have pulled together document with Ray Schulte (PMT Risk Manager) review. I will meet with Mike Spitz (PMT FEL TL), Walt Almon (Ops Mech, Civil & Lift Engineer Team Lead, Alaska Operations-Engineering Svcs), and Ray Schulte to review and approve. I will send you an email and leave a message when this task is completed.

I thank you again for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office

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From: Buckendorf, Randal  
Sent: Monday, November 17, 2014 9:47 AM  
To: Lujan, Carlos (BP)  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael



Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information Prior to my review I need to know that everyone in Projects has reviewed and approved this as well. Randal

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From: Lujan, Carlos (BP)  
Sent: Monday, November 17, 2014 9:36 AM  
To: Buckendorf, Randal  
Cc: Schulte, Ray; Almon, Walter; Spitz, Michael  
Subject: RE: Carlos Lujan UAA PM A686A & 686B Thesis Topic - Potential BP Proprietary Information

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I thank you for your time.

**Carlos Lujan**  
**AK, OPS PMT PL-Lujan**  
(907) 564-5274 Office



